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Horticultural Products Review

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EXPORT SUMMARY

U.S. exports of horticultural products to offshore destinations (destinations other than Canada*) in December totaled $221 million, down 3 percent from the same month a year earlier. Most horticultural commodity groups actually recorded improved export shipping levels during the period. The overall decline is attributed to a smaller export volume for tree nuts. Almond exports, including both shelled/prepared almonds and unshelled almonds, were down sharply in December in response to reduced volumes destined for markets in Western Europe and India. Walnut and pistachio exports in December also were weak. Export value for all horticultural products during the first quarter of fiscal year 1990 (October 1989-September 1990) totaled $852 million compared to $795 million during the same period a year earlier.

(*Canada is excluded because U.S. export data to Canadian destinations are not accurate. Many export shipments to Canada are not counted.)

Approved by the World Agricultural Outlook Board – USDA

U.S EXPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD EXC. CANADA, OCTOBER-SEPTEMBER YEAR
DEC 89

NAME		QUANTITY					VALUE (000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR, FRUIT CITRUS	MT										
GRAPEFRUIT		24,684	23,786	73,993	81,274	453,581	11,466	12,571	35,385	42,557	220,228
LEMONS		9,310	6,683	36,489	32,220	130,615	4,990	3,931	26,601	27,058	91,637
ORANGES, INCL TMPL		13,897	15,901	32,724	44,110	274,497	8,000	9,010	18,780	27,921	159,921
OTHER CITRUS		934	213	2,442	721	15,404	551	237	1,676	755	9,591
Subtotal:----		48,826	46,584	145,648	158,326	874,097	25,009	25,750	82,443	98,292	481,377
FR, FRT, NON-CIT	MT										
APPLES		35,571	40,034	106,648	120,042	203,616	17,358	19,691	52,140	57,599	102,190
AVOCADOS		475	41	1,289	525	5,599	550	52	1,653	668	7,346
CHERRIES SWT & TRT		148	100	507	246	20,017	169	100	557	301	56,503
GRAPES		8,608	5,941	36,107	35,456	71,267	8,334	6,366	36,210	35,711	73,431
KIWIFRUIT		587	181	1,340	567	5,215	836	287	2,135	966	8,153
MELONS		209	253	2,125	2,154	19,185	92	136	1,230	1,122	9,605
PAPAYA		885	660	2,357	2,694	10,633	850	572	2,243	2,378	10,002
PEACHES & NCTRNS		145	470	655	1,317	12,081	88	305	493	828	7,194
PEARS		6,015	9,213	16,176	24,660	38,239	2,841	4,094	7,616	11,303	17,140
STRAWBERRIES		121	21	1,106	955	6,197	292	48	4,918	4,280	19,978
OTHER NON-CITRUS		1,245	411	7,105	3,791	54,562	1,490	479	9,604	4,376	48,541
Subtotal:----		54,015	57,330	175,420	192,412	446,615	32,906	32,134	118,804	119,536	360,088
CND/PREP FRUIT	MT										
CHERRIES TRT CND		212	373	763	2,270	5,617	284	620	1,059	3,051	7,700
FRUIT MIXTURES		2,205	1,438	6,337	4,883	16,891	2,307	1,310	6,788	5,052	17,956
MARACHINO CHRY		119	105	659	456	2,189	230	190	1,278	858	4,089
PEACHES CANNED		1,161	928	4,795	3,071	16,341	1,066	908	4,519	3,163	15,263
PINEAPPLE CANNED		832	406	2,032	667	5,217	677	365	1,883	630	4,905
FRT PREP/PRES		2,940	2,831	7,696	7,847	27,934	2,881	2,661	8,104	7,913	29,717
OTHER CANNED FR		524	786	2,328	4,466	16,623	807	1,302	3,331	5,663	18,848
Subtotal:----		7,996	6,869	24,613	23,664	90,814	8,254	7,359	26,964	26,333	98,483
DRIED FRUIT	MT										
PRUNES, DRIED		4,736	5,793	17,672	22,623	54,392	7,805	9,500	27,977	35,145	88,316
RAISINS, DRIED		9,173	7,304	24,876	23,059	90,598	13,310	12,305	36,819	37,986	137,141
OTHER DRIED FRUIT		595	744	2,073	2,771	9,807	1,590	1,711	5,101	6,378	19,213
Subtotal:----		14,504	13,842	44,623	48,454	154,798	22,706	23,516	69,898	79,510	244,671
FROZEN FRUIT	MT										
BLUEBERRIES, FZN		1,237	273	3,249	1,353	6,499	584	201	1,751	1,015	3,823
STRAWBERRIES, FZN		339	763	1,253	1,759	8,032	416	1,058	1,446	2,240	8,871
OTHER FZN FRUIT		650	371	1,930	1,961	7,466	765	451	2,446	2,220	9,772
Subtotal:----		2,228	1,408	6,433	5,074	21,999	1,766	1,711	5,644	5,476	22,467
FRT&VEG JUICE (SSE)	KL										
GRAPEFRUIT JU CNC		4,566	1,650	8,193	3,901	37,978	2,299	1,115	4,010	2,518	23,601
ORANGE JU NT CNC		2,262	1,396	6,437	4,320	40,726	1,219	640	3,316	1,586	18,516
ORANGE JUICE CNC		9,761	11,611	24,769	37,356	160,086	4,021	5,928	11,804	18,512	77,505
OTHER JUICES		14,608	14,062	41,831	37,410	188,523	5,895	7,295	17,001	19,279	102,329
Subtotal:----		31,198	28,720	81,232	82,988	427,315	13,436	14,979	36,133	41,898	221,952
VEGETABLES FR	MT										
ASPARAGUS, FR, CHL		0	2	12	25	9,158	0	6	55	96	26,560
LETTUCE, FR, CH.		1,105	2,713	3,827	5,985	27,163	744	1,767	2,314	3,112	11,902
ONIONS, FR		4,940	6,304	27,924	28,564	49,039	1,570	1,536	7,952	6,762	13,721
TOMATOES, FR, CH.		454	256	968	543	4,819	275	286	623	510	3,492
OTHER VEG, FR.		7,066	6,918	23,778	24,380	82,095	6,229	6,289	19,675	19,854	64,875
Subtotal:----		13,567	16,195	56,510	59,499	172,276	8,820	9,886	30,621	30,336	120,553
VEGETABLES CANNED	MT										
CATSUP & CHILI SA		654	676	2,886	2,952	11,165	516	584	2,141	2,476	8,832
SWEET CORN CANNED		12,935	8,920	35,899	35,404	97,511	10,193	7,764	29,121	29,920	79,030
TOMATO PASTE		129	781	732	2,689	4,864	136	1,108	791	3,317	5,078
TOMATO SAUCE		925	1,616	3,008	9,321	14,952	945	1,560	3,089	7,276	13,434
OTHER CANNED VEG.		10,445	7,391	18,154	23,505	78,425	9,010	10,328	17,226	33,167	101,934
Subtotal:----		25,090	19,386	60,680	73,873	206,919	20,802	21,347	52,370	76,157	208,310
VEGETABLES FZN	MT										
F FRY FZN		9,672	12,414	33,823	37,434	140,635	6,442	7,939	23,092	24,473	91,991
FZN SWT CORN		4,926	4,390	13,916	14,267	52,316	3,757	3,666	10,879	11,647	39,648
OTHER POT. FZN		1,091	1,938	4,395	4,908	17,264	834	1,714	3,189	4,200	15,110
OTHER FZN VEG		3,683	3,294	13,483	12,464	48,171	3,422	2,972	11,533	11,011	45,824
Subtotal:----		19,373	22,037	65,618	69,075	258,388	14,457	16,292	48,694	51,332	192,575
DEHYD VEGETABLES	MT										
GARLIC DEHY		294	480	954	1,332	4,561	502	1,020	1,943	2,905	9,087
ONIONS DEHY		1,970	1,398	5,207	4,397	19,128	3,341	2,914	8,823	9,236	34,796
POTATO DEHYD		2,301	1,881	6,283	6,235	22,305	1,674	2,366	4,535	6,690	19,351
OTHER DEHY VEG.		1,431	1,157	4,475	3,708	19,721	2,662	1,984	7,848	5,360	23,289
Subtotal:----		5,997	4,918	16,920	15,674	65,718	8,180	8,285	23,150	24,193	86,524
TREE NUTS	MT										
ALMND SH/PREP		12,361	10,582	47,658	39,993	150,476	38,831	34,051	146,981	125,628	474,300
ALMONDS, UNSHLD		2,221	550	6,294	2,427	13,300	4,864	1,689	12,788	6,776	30,540
PISTACHIO, UNSHLD		337	134	739	735	4,004	1,409	613	3,168	3,581	14,510
WALNUTS, SHLD		779	1,178	3,744	5,900	11,377	2,395	2,705	10,795	14,123	28,681
WALNUTS, UNSHLD		2,787	1,248	41,365	46,520	45,535	4,314	2,013	65,446	77,472	72,395
OTHER NUTS		1,702	811	5,577	4,568	14,809	4,648	3,124	15,710	13,524	43,002
Subtotal:----		20,190	14,506	105,379	100,145	239,503	56,463	44,198	254,891	241,105	663,431
NURSERY PRODUCTS	NONE										
CUT FLOWERS		0	0	0	0	0	421	386	1,467	1,465	5,162
OTHER NURS, PROD.		0	0	0	0	0	4,428	3,594	12,353	10,742	45,800
Subtotal:----		0	0	0	0	0	4,850	3,980	13,820	12,207	50,963
HOPS & PRODUCTS	MT										
HOP EXTRACT		208	357	898	1,043	2,554	2,494	4,406	12,293	11,507	33,647
HOP PELLETS		103	273	404	2,771	8,345	607	966	1,610	12,945	21,917
HOPS, NSFP		116	35	555	264	1,491	521	184	2,477	1,584	8,615
Subtotal:----		428	666	1,858	4,079	12,391	3,622	5,556	16,382	26,037	64,180
WINE	KL										
GRAPE WINES		3,216	3,765	9,919	13,292	49,700	4,251	5,569	14,561	19,523	69,899
OTHER WINE PRODUCT		90	154	826	609	9,453	98	63	1,039	496	5,202
Subtotal:----		3,306	3,919	10,746	13,902	59,153	4,349	5,632	15,601	20,020	75,102
Grand Total:							225,627	220,633	795,421	852,438	2,890,683

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES
WORLD SUMMARY, OCTOBER-SEPTEMBER YEAR
DEC 89

NAME		QUANTITY					VALUE (000 DOLLARS)				
GROUP & COMMODITY		CURR MO LAST YR	CURR MO CURR YR	YR TODATE LAST YR	YR TODATE CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FRESH FRUIT	MT										
APPLES		4,397	3,396	19,884	19,220	116,285	1,925	1,569	7,655	5,906	48,382
AVOCADO		627	746	3,843	4,011	4,524	478	493	3,551	3,862	4,078
BANANA		223,053	235,010	694,629	744,955	2,869,739	60,719	64,824	189,784	209,020	795,277
CANTELOUPE		14,853	12,783	20,811	18,390	218,401	3,964	3,501	5,555	4,998	72,174
GRAPE		7,878	10,321	11,714	11,683	280,754	7,622	9,892	8,407	10,890	217,842
KIWIFRUIT		6	0	157	33	19,869	10	0	363	62	18,598
MANGO		64	149	180	401	52,219	37	140	132	363	42,558
PEACH		6,851	5,851	7,348	6,078	45,391	4,968	3,935	5,263	4,113	30,449
PEAR		218	231	3,018	2,128	39,943	430	353	6,955	4,678	25,052
PINEAPPLE		5,771	7,893	19,172	25,478	92,141	2,282	3,089	7,863	11,055	38,108
RASPBERRY		178	226	241	245	9,169	698	607	854	700	15,681
STRAWBERRY		1,681	976	2,855	2,145	16,334	2,878	1,371	5,062	4,040	18,526
OTHER MELON		5,866	11,964	10,154	17,904	101,802	2,099	3,274	3,809	5,090	32,374
OTHER FRUIT		27,250	30,620	81,373	74,139	436,377	10,944	11,295	30,043	22,133	117,992
Subtotal:----		298,699	320,172	875,384	926,818	4,302,956	99,060	104,348	275,304	286,917	1,477,097
DRIED FRUIT	MT										
DATE		1,098	1,844	1,882	3,663	10,049	1,270	2,207	2,166	3,171	9,572
DRD APRICOT		980	661	3,342	2,931	7,372	2,180	1,286	7,068	5,665	16,276
DRD FIG & PASTE		266	317	2,822	3,235	5,419	354	368	4,372	4,325	7,309
RAISIN		1,156	1,099	3,709	3,604	10,598	1,031	1,142	3,367	3,480	9,714
OTHER DRD FRUIT		795	1,371	2,316	4,622	22,831	1,164	2,466	3,672	7,684	23,889
Subtotal:----		4,296	5,294	14,073	18,057	56,271	6,001	7,471	20,647	24,327	66,762
FROZEN FRUIT	MT										
FZN RASP		30	121	101	470	3,203	73	199	246	696	4,746
FZN STR		692	144	2,048	475	20,839	380	146	1,193	431	13,154
OTHER FZN FRUIT		217	812	1,339	2,492	8,089	444	1,290	2,413	4,390	11,345
Subtotal:----		940	1,078	3,489	3,439	32,131	898	1,636	3,853	5,519	29,246
CND/PREP FRUIT	MT										
CANNED PEACH		8,451	4,760	19,088	13,279	50,435	5,937	3,230	12,919	8,760	32,644
CANNED PEAR		102	40	313	409	1,218	56	25	171	210	756
CANNED PINEAP		22,954	0	59,714	0	214,390	13,918	0	35,711	0	126,524
MIXED FRUIT		1,577	1,197	4,112	3,697	18,700	1,122	956	2,775	2,803	13,975
PREP/PRES FRUIT		6,047	14,856	19,525	46,621	150,729	5,431	20,438	19,011	68,021	210,401
OTHER CND FRUIT		15,155	11,741	45,043	34,694	136,156	19,206	18,242	59,819	55,313	192,304
Subtotal:----		54,290	32,596	147,798	98,702	571,631	45,671	42,893	130,409	135,109	576,606
FRT&VEG JUICE (SSE)	KL										
APPLEPEAR JU		109,566	49,352	288,549	177,625	942,315	20,908	9,909	59,849	35,586	195,193
FCOJ		157,796	144,778	504,998	432,878	1,110,287	59,880	34,083	190,046	107,439	383,758
GRAPE JU		3,874	6,429	14,430	19,046	62,114	975	1,592	3,444	4,752	15,086
PINAP JU		14,497	29,819	44,490	73,075	251,522	2,455	6,064	8,073	14,996	47,881
OTHER FRUIT JU		5,396	51,365	16,450	137,896	413,601	4,695	16,510	14,919	43,350	154,243
Subtotal:----		291,131	281,746	868,918	840,521	2,779,840	88,916	68,160	276,334	206,126	796,164
VEGETABLES FR	MT										
ASPARAGUS		701	950	2,408	3,217	14,833	1,164	1,607	3,624	4,743	18,006
BEAN		1,436	2,152	2,233	2,506	13,704	1,429	2,296	2,045	2,665	13,034
BELL PEPPER		6,085	11,911	9,628	18,028	102,086	5,016	7,911	8,616	17,131	76,754
CARROT		4,040	7,448	21,753	24,358	53,165	947	1,093	5,138	4,218	12,204
CHILI PEPPER		2,399	2,223	5,675	4,355	30,994	1,738	2,295	4,690	4,101	26,268
CUCUMBER		25,590	37,378	46,274	59,121	192,544	7,200	13,905	13,982	24,728	79,511
EGGPLANT		1,468	2,073	2,901	2,839	17,232	688	1,866	1,498	2,566	8,573
GARLIC		1	720	165	3,184	13,771	3	744	222	2,689	11,824
LETTUCE		2,042	1,972	2,153	2,092	26,848	694	756	782	897	9,291
ONION		10,512	12,221	21,847	25,947	157,717	9,331	6,293	17,972	16,170	66,295
POTATO, INCL SD		13,522	24,352	48,923	67,578	285,378	2,812	4,795	9,613	13,176	61,959
SQUASH		8,788	12,313	15,945	19,709	75,428	4,271	6,132	7,309	9,328	34,510
TOMATO		6,512	20,589	43,233	71,059	365,850	3,130	13,653	17,460	35,237	212,151
OTHER FRS VEG		18,642	26,906	55,720	62,378	266,222	9,154	13,998	24,038	30,794	128,506
Subtotal:----		101,746	163,216	278,867	366,377	1,615,777	47,585	77,351	116,995	168,448	758,891
VEG CANNED/DEHYD	MT										
CND ARTICHOKE		417	1,213	1,833	4,244	15,280	730	2,317	3,712	8,415	30,556
CND MSHROOMS		1,679	3,274	5,801	9,457	53,359	3,965	8,328	14,159	22,775	128,899
CND PIMIENTO		909	1,254	2,159	2,990	8,428	1,180	1,481	2,850	3,541	10,598
CND TOM		12,685	4,594	30,338	15,279	65,639	7,745	2,313	18,442	7,666	38,927
TOM PASTE		5,515	2,653	16,455	12,795	107,260	4,432	2,398	12,190	11,102	97,511
TOM SAUCE		403	35	1,270	159	2,462	267	20	828	88	1,396
DEHYD VEGETABLES		17,178	7,464	37,887	22,236	121,319	11,218	10,884	27,755	27,761	98,747
OTHER CND VEG		19,781	15,250	52,945	47,580	202,173	18,285	13,546	48,152	40,266	170,067
Subtotal:----		58,569	35,741	148,690	114,742	575,924	47,826	41,290	128,090	121,619	576,705
VEGETABLES FZN	MT										
BROCCOLI FZN		6,580	7,437	17,440	22,744	105,822	4,371	4,845	10,930	14,920	65,335
CAULIFLOR FZN		3,052	3,615	8,835	14,302	21,752	2,156	2,614	5,755	9,805	14,561
OKRA FZN		114	230	671	872	3,923	58	118	412	451	2,175
POTATO FZN		2,031	4,197	10,732	13,038	44,879	994	2,243	5,219	6,977	22,984
OTHER VEG FZN		6,666	3,771	18,220	10,690	50,292	5,640	3,770	14,702	10,417	46,545
Subtotal:----		18,445	19,252	55,900	61,649	226,670	13,221	13,592	37,021	42,572	151,601
TREE NUTS	MT										
BRAZILS TOT		574	739	1,711	2,381	6,339	1,922	2,049	5,019	5,943	16,824
CASHEWS TOT		3,079	3,517	10,724	13,324	46,334	14,866	13,186	52,648	54,157	209,929
FILBERTS TOT		716	407	1,649	1,258	4,777	2,056	1,045	5,008	2,914	12,948
PISTACHIOS TOT		29	401	134	1,030	906	82	1,680	497	4,082	2,961
OTHER NUTS		7,444	9,070	24,909	27,474	70,890	9,344	11,625	31,123	38,658	88,952
Subtotal:----		11,844	14,136	39,130	45,468	129,248	28,273	29,587	94,298	105,756	331,616
NURSERY PRODUCTS	NONE										
CARNATIONS		0	0	0	0	0	7,035	6,033	17,152	17,869	72,187
ROSES		0	0	0	0	0	3,912	5,083	13,947	17,351	71,908
OTHER CUT FLRS		0	0	0	0	0	12,718	11,513	43,208	37,031	157,931
OTH NURS PROD		0	0	0	0	0	9,271	10,203	37,020	46,863	115,677
Subtotal:----		0	0	0	0	0	32,937	32,834	111,329	119,115	417,704
HOPS & PRODUCTS	MT										
HOPS & PELLETS		225	193	291	563	4,936	1,084	918	1,226	2,446	21,165
OTHER HOP PRODS		0	0	0	28	676	0	0	0	105	3,614
Subtotal:----		225	193	291	592	5,612	1,084	918	1,226	2,552	24,780
WINE	KL										
GRAPE WINES		23,366	23,624	89,872	94,469	274,248	73,319	75,492	299,368	332,619	886,210
OTHER WN PROD		1,113	338	3,905	1,308	9,051	1,738	737	6,164	2,545	15,582
Subtotal:----		24,479	23,962	93,777	95,777	283,300	75,058	76,229	305,532	335,165	901,793
Grand Total:							486,535	496,315	1,501,044	1,553,229	6,108,971

General Developments

--Late January storms damaged Dutch greenhouse operations. On January 25, 1990, a powerful storm with winds of 80-90 miles per hour damaged 70 percent of the 10,000 greenhouse operations in the Netherlands. Although only 100 greenhouses were severely damaged, crop and structural damage to greenhouse horticulture may reach $80-$95 million. The Dutch Ministry of Defense quickly provided 500-600 troops to help clean-up, which was expected to take less than two weeks. Overall, there should be little negative impact from this storm on Dutch production, or prices, of flowers and vegetables. The total value of Dutch horticultural agriculture in 1988 was approximately $5.3 billion. U.S. imports of cut flowers and vegetables from the Netherlands in 1989 totaled $46.1 million.

--Turkey recently announced new export subsidy levels for several horticultural items. The export subsidy is specified in dollars per metric ton with a maximum payment set at a percentage of the total value of the export sale. The subsidies were published in the January 26, 1990, edition of the Official Gazette and became effective as of that date.

Commodity	Export Subsidy	Maximum Percent of Total Value
Potatoes		
Fresh	$30	15
Frozen	$80	15
Fried	$80	15
Tomatoes	$30	15
Onions, dry	$20	15
Frozen vegetables, excluding potatoes	$100	10
Canned fruit and vegetables (max. of 5 Kg. containers)	$50	10
Frozen fruit	$100	10
Fresh citrus	$80	20
Apples	$66	20
Concentrated fruit juice	$250	10
Fruit pulp	$50	10

The Foreign Agricultural Service announces the Taipei Fresh Fruit and Vegetable Show. This is the first trade show that the U.S. government is sponsoring that will feature fresh produce. The show will be held at the Ritz Hotel in Taipei, Taiwan, August 6-7, 1990. This show has been developed in response to strong and growing demand for fresh produce items in Taiwan. The cost of participation is $1,500, which will cover the cost of booth space, equipment rental, and shipping of product samples. FAS also will provide publicity, consolidation, and customs clearance services. For more information, please contact John O'Connell at (202) 382-8497.

Citrus and Products

--French imports of fresh grapefruit during the current 1989/90 marketing season will decline for the second consecutive year. After rising sharply in recent years, French per capita consumption of fresh grapefruit now has

reached 2.6 kilograms (5.7 pounds), one of the highest levels in the world. French imports of grapefruit peaked at 155,842 tons in 1987/88, more than 25 percent above the volume of a decade earlier. Grapefruit imports in 1988/89 fell 3 percent to 150,831 tons. The United States remained France's leading supplier of grapefruit in 1988/89, with shipments totaling 77,600 tons. Florida grapefruit accounted for roughly 99 percent of all U.S. shipments. Other important suppliers in 1988/89 included Israel with 22,476 tons, South Africa with 15,519 tons, Argentina with 13,846 tons, and Cyprus with 6,749 tons. The decline in import volume witnessed last season is attributed to tight supplies in November and December 1988 of larger sized Florida fruit preferred by consumers and an increase in consumption of avocados. Avocados compete with grapefruit as a first course at meals at French dinner tables. French imports of U.S. grapefruit in 1989/90 will decline sharply in response to the Florida freeze in December 1989.

Fresh Non-Citrus

--Bumper supplies of kiwifruit are heightening competition for markets around the world. Northern Hemisphere producers are marketing their crop during the first half of the year, while New Zealand and other Southern Hemisphere producers market their crop during the second half of the year.

Despite last year's short crop in New Zealand, the country's new Kiwifruit Marketing Board (KFMB), held back large supplies for sale late in the season, thus loading up the Japanese and European markets with large amounts of low priced fruit after new crop fruit from the Northern Hemisphere was available. The forecast for 1990 is for a recovery in production to about 248,000 tons, with an export pack expected to reach 216,000 tons (60 million trays at 3.6 kg/tray). Also, in 1990 the KFMB will introduce a premium payment to growers for larger fruit and will penalize smaller fruit. In France, market prices for kiwifruit collapsed due to the large increase in domestic and imported kiwifruit supplies. French kiwifruit producers, who suffered from large stocks of New Zealand kiwifruits in late 1989, reportedly, are now competing with heavy imports of inexpensive, small Italian kiwifruits.

About 99 percent of Japan's imports come from New Zealand, with the United States supplying the balance. Expanded Japanese domestic production has cut U.S. shipments out of the market. Canada depends on imports for about 95 percent of its kiwi supplies. The United States dominated the market in Canada in 1990. Shipments from New Zealand, Chile, and Italy are expected to be at about the same levels as the previous year.

West German importers see few opportunities for U.S. kiwifruit on the German market in 1990, because of the competitive prices offered by European producers, especially Italy, who also benefit from being within the EC's 11 percent tariff barrier.

Spanish imports of kiwifruit in 1990 are forecast to reach 13,000 tons, up from 9,000 tons the previous year. Imports of fresh kiwi from the United States are not permitted entry due to Spanish phytosanitary regulations. In Sweden, imports are forecast to reach almost 9,000 tons in 1990, up only slightly from the previous year. New Zealand and Italy have been the primary suppliers. Imports of kiwifruit into Finland in 1990 are expected to total only slightly above 3,500 tons registered in 1989.

A detailed report will be published on kiwifruit production, supply and total distribution in next month's Horticultural Products Review.

--Argentine fruit production harmed by bad weather. Apples and pears in the Río Negro valley suffered damage from a severe hailstorm on February 12, 1990. Also, a heavy rainstorm on February 13, 1990, hit the San Juan area affecting table and wine grape vineyards. Losses in the Río Negro Valley are estimated at 20-30 percent of fruit production. Extensive damage will spur increased production of juice concentrate and a decline in domestic fresh utilization. Apple and pear exports are not expected to decrease. U.S. imports of Argentine fresh apples in 1989 reached 15,600 tons, double the 1988 volume. U.S. imports of Argentine fresh pears in 1989 were 11,900 tons, up 61 percent over 1988.

Dried Fruits and Tree Nuts

--The 1990 Australian sultana production forecast has been reduced from 85,000 tons to 73,000 tons due to dry weather in the State of Victoria. Victoria, which produces 75 percent of Australia's sultanas, has experienced temperatures of 35-45 degrees Celsius (95-115 degrees Farenheit) and strong winds throughout the month of January. The hot and windy weather caused the untimely wilting of grapes.

Exports to minor markets are expected to be the first affected by the reduction in output. Australian exports to its four major export markets--West Germany, Canada, the United Kingdom, and New Zealand--are likely to be unaffected.

--Updated production, supply and distribution tables for almonds, walnuts, pistachios and hazelnuts are included in the statistical section of this issue.

U.S. production of almonds is estimated at 217,727 tons, 13 percent higher than the original forecast but below last year's production. Favorable weather is the main factor resulting in this change. Based on exports during the first 6 months of marketing year 1989/90, it is expected that total U.S. almond exports for the year will be less than the original forecast and almost 21 percent below last year's level.

U.S. pistachio production has been surprisingly high this year despite the fact that this is the off-year in the pistachio production cycle. Originally the industry was expecting production to be below 13,000 tons, but the current crop estimate for pistachios is 17,690 tons. As a result, it is expected that the United States will export 8,600 tons of pistachios, inshell basis, compared with the original forecast of only 4,500 tons. For other updates refer to the statistical section of this issue.

Other Processed Fruit

--U.S. imports of canned peaches from Chile and Argentina increased dramatically during the first seven months of the 1989/90 marketing year (June-December 1989) compared to the same period in 1988/89. Imports of Chilean canned peaches jumped 42 percent, from 4,993 tons to 7,082 tons and represents 27 percent of total U.S. canned peach imports (26,395 tons) for the first seven months of the 1988/89 marketing year. Unit prices of Chilean canned peaches have remained steady for the past two years, averaging $706 per ton, f.o.b., port of embarkation. Imports from Argentina have tripled, from 716 tons in the first part of 1988/89 to 2,249 tons so far in the present marketing year. Although U.S. imports of Greek canned peaches is down 15

percent for the first 7 months of 1989/90 compared to the previous year (13,178 tons compared to 15,572 tons, respectively), Greece remains the largest supplier of canned peaches to the U.S. market, furnishing 50 percent of all imports. The unit price for Greek canned peaches for the first half of 1989/90 is $617 per ton, a decline of 6 percent from last year's unit price of $657 per ton.

Chile has also doubled its supply of canned fruit mixtures to the U.S. market. U.S. imports of Chilean fruit mixtures for the first seven months of the 1989/90 marketing year total 1,012 tons, accounting for nearly 50 percent of U.S. imports of non-tropical fruit mixtures so far this year.

Vegetables

--The EC has proposed a 2 percent increase in the tomato for processing production quota for 1990/91. The rise results from the increase in Spain's quota, from a total 667,000 tons of fresh tomatoes eligible for processing subsidies to 767,050 tons. Under the terms of accession, Spain is eligible for the increase in 1990/91. Portugal is eligible for an increase in the quota in 1991/92.

EUROPEAN COMMUNITY: PROPOSED QUOTAS FOR PROCESSED TOMATO PRODUCTS
QUANTITIES OF RAW MATERIAL USAGE, 1990/91
(Metric Tons)

COUNTRY	PASTE[1]	WHOLE PEELED[2]	OTHER PRODUCTS	TOTAL
Italy	1,655,000	1,185,000	453,998	3,293,998
Greece	967,000	25,000	21,593	1,013,593
France	283,691	58,628	50,087	392,406
Spain	425,500	240,350	101,200	767,050
Portugal	662,945	9,600	22,192	694,737
EC-12	3,975,622	1,487,228	598,884	6,161,787

[1]Conversion rate for paste: 5.5-6.0 raw product to 1. [2]Conversion rate of whole peeled: 1.2-1.5 raw product to 1.

In other member states the total amount of tomatoes eligible for subsidies stay the same, although the amount of tomatoes allocated for paste production in France and Portugal declined, while tomatoes allocated for "other products" increased. The quotas remain based on national production, although there had been some discussion within the Community of changing the quotas from national to EC-wide.

The EC proposed quota for 1990/91 is not as flexible as last year's quota. Instead of being able to transfer 10 percent of the tomato paste quota to the quota of "other products," and vice-versa, only 5 percent can be transferred between products. Twenty percent of the canned whole peeled tomato quota can be allocated to either tomato paste or "other products," which is the same as last year's quota. This mechanism reflects the declining demand for canned whole peeled tomato products and the increasing demand for paste and specialty products. Within each member state, processors are allocated a certain amount of the national quota based on previous production.

Wine

--The Province of Quebec Liquor Board (SAQ) met the pricing obligations for wine stated in the U.S.-Canada Free Trade Agreement on January 1, 1990. The changes made by SAQ resulted in the formation of only two categories of wine: "Bottled in Quebec" and "Bottled Outside Quebec." The first category covers wine produced in Quebec and bulk wines of any origin bottled in Quebec. The second or "imported" category covers wines produced and bottled in other provinces of Canada as well as foreign countries. SAQ reduced the mark-up differential between the "imported" and "domestic" wine by raising the mark-up on the "domestic" wine. The new mark-ups by price step are given in the table below.

Value per Case (C$/12 bottles)	Domestic (Pct.)	Imported (Pct.)
25.01 to 40.00	67	80
40.01 to 75.00	60	60
Over 75.00	50	50
Plus per case charge:	C$32.50	C$35.75

SPAIN'S PROCESSED TOMATO PRODUCTS INDUSTRY

The Spanish tomato industry is fast becoming one of the more diversified in the world. Increased emphasis is being placed on the production of high-valued specialty tomato products rather than on tomato paste and canned tomatoes. Spanish production and exports of tomato products are recovering from a decline that coincided with its accession to the European Community on January 1, 1986.

Structure of the Industry

The Estremadura area, located in southwest Spain, is the main producer of tomatoes for paste, while tomatoes for canning are produced mainly in the regions of Navarra, Rioja, and Origin in the Ebro River basin. The average size of tomato farms is very small, usually operated by a single family. In Estremadura, the average farm size is 3.5 hectares, with 70 percent of all tomato farms under 2 hectares. In the Ebro River Basin, the average farm size is even smaller, about 2.5 hectares, although only 44 percent of tomato farms are under 2 hectares. A few large farms of about 100 hectares exist in Estremadura. These farms use mechanized planting and harvesting. Approximately 15 percent of Spain's processed tomato crop is harvested mechanically.

Processing capacity is estimated at three times the annual EC quota of 667,000 tons of fresh tomatoes. Plant size and total capacity began to expand in the early 1980's mainly as a result of mergers and investment in modern, automated equipment. Since becoming a member of the EC, Spain has attracted foreign investment in its processed tomato industry, with U.S., Italian, and French firms purchasing large Spanish processing plants. Also, Spanish firms from other sectors are buying tomato processing plants. There are approximately 200 factories in Spain that process tomato products. Many of these plants also process other vegetables and fruits. Of these 200 plants, 13 produce solely tomato paste.

Production of high-valued tomato products includes "tomate frito" and tomato powder. Both these products use tomato paste as a base. "Tomate frito" is a tomato sauce with blended oil and spices and is consumed almost exclusively by the domestic market. In 1989, 70,000 tons (gross weight) of "tomate frito" was produced, using 30,000 tons of tomato paste, 28-30 percent TSS level. "Tomate frito" is packed in 1 kilogram and 0.5 kilogram containers for the retail market. Spain is becoming the major world producer of tomato powder which is used primarily in soups. Exports of tomato powder are mainly to the EC and the United States. In 1989, tomato powder production was 8,000 tons, using 26,500 tons of tomato paste, 28-30 percent TSS level.

Tomato paste production in Spain is 80 percent at the 28-30 percent TSS level and 20 percent at the triple concentrated level of 36-38 percent TSS. In 1989, 83,333 tons of tomato paste was produced at an average industrial rate of 6:1.

SPAIN: PRODUCTION AND USAGE OF TOMATO PASTE, 1989
(METRIC TONS)

FINAL PRODUCT	FRESH TOMATO USAGE	28-30% PASTE EQUIVALENT	FINAL PRODUCT TONNAGE
PASTE, 28-30%	119,912	19,985	19,985
PASTE, 36-38%	41,088	6,848	5,366
POWDER	159,000	26,500	8,000
"FRITO"	180,000	30,000	70,000
TOTAL	500,000	83,333	

Spanish production of canned tomatoes for 1989 is estimated at 228,000 tons, of which 138,000 tons went to canned whole peeled tomatoes and the remaining 90,000 tons are primarily for crushed tomatoes, "tomate triturado," and some other non-whole tomatoes. While the output for canned whole peeled tomatoes is forecast to be 21 percent under its EC quota, production of "other tomato products" is forecast at 27 percent above the quota.

"Tomate triturado," which is a Spanish version of crushed tomatoes, is displacing whole peeled tomatoes as the leading canned tomato product in the domestic market. In 1989, the canned tomato product mix consisted of 40 percent of whole peeled tomatoes and 60 percent of "other tomato products." In 1986, the product mix was 50-50.

EC Membership

Prior to EC membership, the Spanish government had a system of export incentive programs for processed tomato products which included both fiscal relief and direct aid. These subsidies included export tax rebates of 7.2 percent of the export f.o.b. value and pre-financing of exports through credit guarantees. After EC accession, these export subsidies were eliminated, leading to a decrease in production and exports.

Under the terms of accession, the Spanish processed tomato industry began a 7 year transition period beginning on January 1, 1986. During the first 4 years of membership, Spain had a small guarantee threshold of tomato products. Beginning in the 1990/91 marketing year, Spain's quota will increase from a total of 667,000 tons to 767,000 tons. (See Vegetable Update on page 7 of this Review for proposed EC 1990/91 processed tomato quota.) Spain has consistently produced above its quota. The Spanish industry is anxious to have the quota increased, since fresh tomato processing capacity is estimated at approximately 1.8 million tons.

EC QUOTAS FOR PROCESSED TOMATO PRODUCTS
QUANTITIES OF RAW MATERIAL USAGE
FOR SPAIN
(Metric Tons)

YEAR	PASTE[1]	WHOLE PEELED	OTHER PRODUCTS	TOTAL
1989/90	370,000	209,000	88,000	667,000
1990/91[2]	425,500	240,350	101,200	767,050

[1]Conversion rate for paste: 5.5-6.0 raw product to 1. [2]Proposed

The amount of EC aid granted to Spain during the transition period is adjusted to accommodate the difference of the minimum grower price, which is less in Spain than in the EC-10. Beginning in the 1992/93 marketing year, the minimum grower prices and production subsidies in Spain will be identical to those in the EC-10.

SPAIN: EC MINIMUM GROWER PRICES & PROCESSING SUBSIDIES FOR CANNED TOMATO PRODUCTS
(STATED CURRENCY UNIT PER METRIC TON)

CROP YEAR	MINIMUM GROWER PRICE	PROCESSING SUBSIDY		NET COST OF FRUIT	EXCHANGE RATE	NET COST OF FRUIT	EXCHANGE RATE	NET COST OF FRUIT
		NET	RAW WT EQUIV					
TOMATO PASTE								
	ECU	ECU	ECU	ECU	PTA/ECU	PESETA	PTA/$	DOLLARS
86/87	53.58	157.31	25.17	28.41	145.77	4,141	136	30.52
87/88	57.94	172.20	27.55	30.39	154.00	4,680	121	38.68
88/89	64.17	179.63	28.74	35.43	154.00	5,456	123	44.35
89/90	70.41	207.10	33.14	37.27	154.00	5,740	115	49.91
WHOLE PEELED SAN MARZANO								
	ECU	ECU	ECU	ECU	PTA/ECU	PESETA	PTA/$	DOLLARS
86/87	79.39	39.17	29.38	50.01	145.77	7,290	136	53.72
87/88	87.86	35.66	26.75	61.12	154.00	9,412	121	77.78
88/89	99.72	52.58	39.44	60.29	154.00	9,284	124	74.87
89/90	111.57	66.33	49.75	61.82	154.00	9,521	115	82.79
WHOLE PEELED ROMA & SIMILAR								
	ECU	ECU	ECU	ECU	PTA/ECU	PESETA	PTA/$	DOLLARS
86/87	74.13	41.19	30.89	43.24	145.77	6,303	136	46.45
87/88	78.53	32.62	24.47	54.07	145.77	7,881	121	65.13
88/89	85.52	43.44	32.58	52.94	154.00	8,153	123	66.28
89/90	92.51	50.92	38.19	54.32	154.00	8,365	115	72.73
NON-WHOLE PEELED								
	ECU	ECU	ECU	ECU	PTA/ECU	PESETA	PTA/$	DOLLARS
86/87	69.35	24.71	18.53	50.82	145.77	7,408	136	54.59
87/88	69.22	24.61	18.46	50.76	145.77	7,400	121	61.15
88/89	73.20	28.24	21.18	52.02	154.00	8,011	123	65.13
89/90	77.18	28.86	21.65	55.54	154.00	8,552	115	74.36

NOTES: Net to raw weight equivalent: paste 0.16, peeled 0.75.
Dollar exchange rates are three months average of January to March of each year.

Production and exports of tomato products declined after Spain became a member of the EC. The elimination of export subsidies, combined with a depressed world market at the time contributed to the decrease. The elimination of compensatory amounts, which were applied to Spanish exports of tomato products during the first two years of EC membership, the reduction of the EC duty on tomato products (which is zero, beginning in 1990), and the upswing in world prices have all contributed to production and export increases approaching pre-accession levels. Spain's production of tomatoes for processing has increased 37 percent from 618,200 tons in 1986 to 850,000 tons in 1989.
While the Spanish industry sees its ability to compete with other EC countries growing with increased quotas and equal production subsidies, the industry believes that its competitiveness in the EC market would be even more enhanced if current production subsidies were dismantled and free market forces dictated sales.

Trade

Spanish exports of tomato paste increased dramatically in 1987 and 1988, due to an increase in tomato powder exports and the tight world market. The bulk of the increase has gone to other EC countries. Spanish canned tomato exports are close to their pre-accession levels, with the main markets being the United States and the EC. In retaliation for the prohibition by the EC of beef imports from cattle treated with growth hormones, the United States applied a 100 percent tariff on canned tomatoes exported by the EC, beginning January 1, 1989. This has meant a significant loss to the Spanish industry, including greater competition in remaining third country markets. U.S. import statistics have shown a decrease of 70 percent of Spanish canned tomato imports from 1988 to 1989. Spanish canned tomato exporters are anxious for a resolution of this dispute.

SPAIN: EXPORTS OF CANNED TOMATO PRODUCTS
(Includes whole, crushed, and diced)
(Metric Tons, Calendar Year)

YEAR	U.S.	EC	CANADA	SWEDEN	OTHER	TOTAL
1984	33,746	26,709	11,060	3,093	6,292	80,900
1985	31,940	13,923	12,121	1,917	3,211	63,112
1986	19,299	12,868	4,483	1,171	1,577	39,398
1987	24,191	21,607	6,229	1,230	2,773	56,030
1988	21,982	25,505	8,087	2,163	2,916	60,653

SOURCE: Spanish Trade Ministry

SPAIN: EXPORTS OF TOMATO PASTE
(Includes tomato powder, at 28-30% TSS Basis)
(Metric Tons, Calendar Year)

YEAR	U.S.	EC	ALGERIA	SWEDEN	OTHER	TOTAL
1984	4,496	12,244	2,090	2,939	4,637	26,406
1985	5,517	13,021	7,754	1,092	6,294	33,678
1986	4,977	6,068	2,282	1,504	3,493	18,324
1987	4,314	19,589	13,282	979	6,269	44,433
1988	8,172	22,303	7,997	1,366	5,073	44,911

SOURCE: Spanish Trade Ministry

Conclusion

The Spanish tomato processing industry is optimistic about its future. Favorable conditions for tomato growing and processing exist in the country, including: 1) excellent client for tomato growing in Estremadura, in terms of yields and low mold counts, 2) availability of irrigated land, and 3) high labor costs that can be offset through mechanization and the use of cheap Portuguese labor. Domestic demand for processed tomato products is increasing due to changes in tastes and the increase in large retail outlets in the country, such as supermarkets and hypermarkets, forcing big volume contracts. Trade sources indicate that although Spain has the capacity to triple its current tomato pack a more realistic level is a doubling of the current pack in the near future.

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TOMATO PRODUCTS: PRODUCTION, SUPPLY AND DISTRIBUTION IN SPAIN
(METRIC TONS, MARKETING YEARS[1])

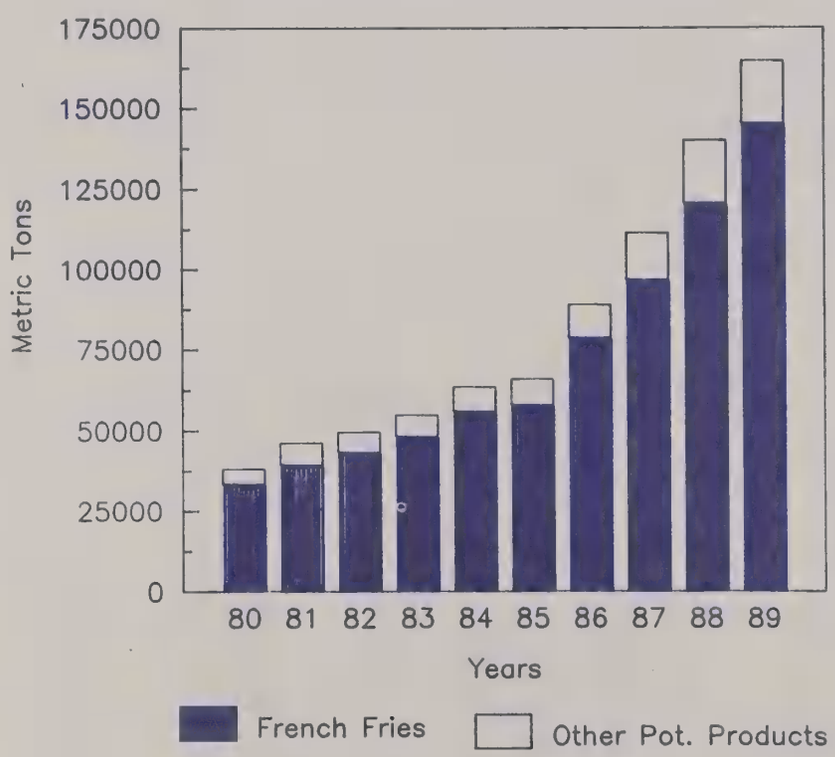
	Deliv. To Processors	Beginning Stocks	Production	Imports	TOTAL SUPPLY/ DISTRIB.	Exports	Domestic Consumption	Ending Stocks
Canned Tomatoes[2]								
1982	0	4,600	201,000	0	205,600	45,080	155,520	5,000
1983	240,000	5,000	191,000	100	196,100	86,260	106,340	3,500
1984	310,000	3,500	259,000	150	262,650	65,900	136,750	60,000
1985	235,000	60,000	202,500	0	262,500	48,000	159,000	55,500
1986	141,200	55,500	116,200	100	171,800	48,700	123,100	0
1987	217,000	0	177,000	300	177,300	48,100	129,200	0
1988	244,000	0	203,000	100	203,100	75,400	127,700	0
1989	274,000	0	228,000	200	228,200	80,000	138,200	10,000
Tom. Paste[3]								
1982	0	0	68,000	0	68,000	43,960	21,040	3,000
1983	425,000	3,000	74,500	1,230	78,730	47,670	28,060	3,000
1984	487,000	10,000	84,000	170	94,170	50,900	25,370	17,900
1985	459,000	17,900	74,600	0	92,500	42,400	30,100	20,000
1986	316,600	20,000	56,000	500	76,500	43,200	30,000	3,300
1987	332,000	3,300	57,000	6,200	66,500	35,500	31,000	0
1988	410,000	0	71,000	7,900	78,900	43,200	35,700	0
1989	500,000	0	83,000	2,000	85,000	49,000	36,000	0

[1]Marketing Years are July to June. [2]Includes whole peeled, wedged, diced, crushed, and other non-concentrated products. [3]28-30 percent TSS Basis.

U.S. frozen potato product exports have grown from 38,349 metric tons in 1980 to 164,798 tons in 1989, a 330 percent increase. The driving force behind this tremendous growth has been frozen French fry exports to Japan. Frozen French fries made up 88 percent of U.S. frozen potato product exports in 1989, while Japan accounted for 88 percent of total frozen potato product exports. These percentages have remained relatively constant throughout this period of growth. The average unit value of exports also has remained relatively constant during the past 10 years.

This stable price structure has been one of the factors contributing to the increase in U.S. exports. The differences in export unit values, shown in the table below, are a result of product mix. Those markets with low unit values, such as Singapore, receive almost all frozen French fries (92 percent in 1989), whereas markets such as the Bahamas receive mainly further processed products such as hash browns (86 percent in 1989).

U.S. FROZEN POTATO PRODUCT EXPORTS



Along with the growth of U.S. frozen potato exports has been a shift in the destination of the exports not destined for Japan away from Europe and Canada to the developing nations of the Far East and Caribbean. The following table of the top 10 destinations for U.S. frozen potato products in 1989, highlights these new markets. The largest volume decline has been in exports to Canada. U.S. export figures to Canada are understated however, they give an indication of the trend in exports. The decline in exports to Canada from a high of 4,052 in 1987 to 2,774 in 1989 is due in most part to the growth of the potato processing industry in Canada. The other major decline has been in Europe where exports have dropped from a high of 2,029 tons in 1984 to 399 tons in 1989. This decline has been led by shrinking markets in Sweden, West Germany, and the United Kingdom.

U.S. FROZEN POTATO PRODUCT EXPORTS, TOP 10 MARKETS

Country	Metric Tons			% Change	Value ($1,000)			% Change	Unit Values		
	1980	1985	1989	80 to 89	1980	1985	1989	80 to 89	1980	1985	1989
Japan	26,546	51,925	112,252	323%	17,354	36,973	79,377	357%	654	712	707
Hong Kong	2,590	4,011	14,937	477%	2,045	2,817	5,364	162%	790	702	359
Singapore	895	2,636	7,150	699%	685	2,037	3,445	403%	765	773	482
Taiwan	0	74	5,916		0	50	2,750			676	465
Bahamas	481	111	4,422	819%	242	57	6,545	2605%	503	514	1,480
Malaysia	199	1,007	3,976	1898%	120	882	2,484	1970%	603	876	625
Canada	2,284	3,782	2,774	21%	1,116	2,389	1,671	50%	489	632	602
South Korea	108	599	2,769	2464%	73	445	1,878	2473%	676	743	678
Philippines	25	0	2,593	10272%	30	0	1,435	4683%	1,200		553
Indonesia	249	284	1,235	396%	137	197	794	480%	550	694	643
Rest World	4,972	1,718	6,774	36%	3,517	1,481	5,422	54%	707	862	800
TOTAL	38,349	66,147	164,798	330%	25,319	47,328	111,165	339%	660	715	675

The growth markets have been led by Hong Kong, Singapore, Taiwan, and the Bahamas. All of these countries have experienced tremendous economic growth in the past 10 years. There have, however, been numerous other factors which have led to U.S. frozen potato export gains including import liberalization, fluctuations in the U.S. dollar exchange rate, increased popularity of western foods, increased tourism, and the promotional efforts of the U.S. industry.

FACTORS AFFECTING TOP 10 U.S. FROZEN POTATO MARKETS

Country	GNP per Capita 1/ Percentage Change			Exchange Rate Local Currency/U.S.$			Percent. Change	NPPB TEA Expend.2/
	80-85	85-88	80-88	1980	1985	1989	80-89	86-89 ($)
Japan	17.38	12.11	31.59	226.99	238.54	137.94	(39)	7,305,704
Hong Kong	22.67	36.72	57.41	5	7.79	7.81	56	554,192
Singapore	27.08	8.60	38.01	2.1412	2.2002	1.7867	(17)	555,257
Taiwan 3/	24.29	34.93	58.01	35.99	39.85	26.36	(27)	389,500
Bahamas	18.67	N/A	N/A	1	1	1	0	0
Malaysia	12.69	6.65	20.19	2.1769	2.4830	2.6955	24	326,021
Canada	8.25	9.54	18.57	1.1692	1.3655	1.1838	1	0
S. Korea 4/	34.72	21.72	63.97	607.43	870.02	669.45	10	52,872
Philippines	(16.07)	51.54	27.18	7.5114	18.607	21.032	180	20,000
Indonesia	11.97	3.42	15.80	626.99	1110.6	1757.8	180	69,371

1/ The change in GNP/Capita for the Bahamas is between 1980 and 1983, no data is available beyond 1983. The figure used to determine the change in GNP/Capita for Indonesia, South Korea, and Singapore for 1988 is the 1987 figure.

2/ The NPPB TEA expenditure figures are for the fiscal years 1986 to 1989. The fiscal year 1989 figure is incomplete as not all expenditures have been reported. These figures account for TEA funds only and do not include U.S. grower or foreign importer/retailer contributions to the program.

3/ Fast Food restaurants and frozen potato product imports were first allowed into Taiwan in 1984.

4/ South Korean imports of frozen potato products were severely restricted between July, 1985 and July, 1988.

In order to understand the impact of these various factors we need to look at them more closely, on a market specific basis. Japan, Hong Kong, and South Korea provide a representative picture, as well as some insight into the prospects for the future.

Japan

All of the right economic and cultural factors have been in place for an explosion in U.S. frozen potato exports to Japan. U.S. exports reached an all time high of 112,252 metric tons, valued at $79.4 million in 1989. Of these exports, frozen French fries accounted for 102,434 tons or 91 percent. The remaining 9 percent is made up of other frozen potato products such as whole baked potatoes for food service use and consumer packed products. The United States is by far the dominant source for frozen potato products in Japan with a 72 percent market share in 1988, according to figures from the Japanese Ministry of Agriculture and Fisheries (MAFF) and the Japan Frozen Food Association. This market share has grown steadily from 29 percent in 1978, mainly at the expense of potato products produced in Japan, which have declined from 67 percent to 12 percent over the same period.

JAPAN: FROZEN POTATO MARKET SHARE
(Metric Tons)

Source	1980	1981	1982	1983	1984	1985	1986	1987	1988
US	26,545	30,499	33,489	39,081	44,282	48,886	62,391	84,773	103,948
Canada	2,657	3,671	4,033	5,460	5,795	6,494	7,382	12,029	18,571
Other 1/	0	56	44	78	30	626	2,126	1,170	4,902
Japan	36,009	40,115	42,825	37,466	37,134	37,000	26,500	22,831	17,266
Total	65,211	74,381	80,391	82,085	87,268	93,006	98,568	120,803	144,687

1/ These figures are made up mainly of product from the Netherlands.

The economic factors in Japan which have combined to fuel this growth in exports have included a steadily growing economy with much higher per capita incomes and resulting increased disposable income; an appreciating yen during the past five years, which has lowered the import price of the U.S. product; and a stable import policy. Added to these economic factors has been a cultural shift towards U.S. lifestyles and foods. This shift is reflected in the incredible growth of fast food and U.S.-style family restaurants in Japan. In 1988 there were 3,303 fast food outlets with sales of over $2.8 billion and 1,485 family restaurants with sales of $2.2 billion. These numbers are up from 1,039 fast food outlets and 578 family restaurants in 1980.

The U.S. potato industry has not sat back and let these positive economic conditions do all the work in increasing U.S. potato exports to Japan. Using Targeted Export Assistance (TEA) funds, grower funds and matching funds from Japanese importers, retailers, and restaurants, extensive promotional campaigns have been mounted. In addition to the TEA supported programs, U.S. processors have spent millions of dollars on their own promotions as have Japanese fast food chains and restaurants.

During the 4 years ending in September 1989, $7.3 million in U.S. government funds were spent in Japan under the TEA program, plus approximately $4 million in matching contributions. Another $3.3 million in TEA funds and $1.5 million in contributions are budgeted for fiscal year 1990. TEA expenditures have focused primarily on consumer-oriented activities--83 percent of expenditures between 1986 and 1989. Most important among these has been consumer advertising on television and in newspapers and magazines. For 1990 the emphasis will shift away from television to an expanded print campaign, designed to reach a wider geographic area. The other important consumer activity has been and will continue to be joint promotions with fast food chains and restaurants. The 1990 budget calls for $700,000 in TEA funds to be matched by $1.1 million in contributions from the Japanese food service industry to be used for these joint promotions.

A smaller percentage of TEA funds are used for promoting frozen potato products for home use. This is a small but rapidly growing market in Japan, and one in which the United States is not the market leader. The market leader is the Netherlands with a 30.5 percent market share, followed by the United States with 21.8 percent. Based on market research carried out for the National Potato Promotion Board, the estimated annual expenditure on frozen potato products for household use in Japan has grown 95 percent between 1985 and 1988, to a total of $86.7 million. Japan's Frozen Food Association ranks frozen fried potatoes as the third most popular food for household consumption, behind frozen cooked rice and frozen croquettes.

The Dutch have been able to gain a substantial portion of this market through innovative product design and marketing. The main Dutch brand is shaped in Roman alphabet characters and packaged in bright attractive boxes. Using the alphabet shaped product, the company has carried out extensive television advertising portraying Japanese children spelling English words with the potato products and of course happily consuming them. Major U.S. brands also have developed some television advertisements in recent years, also portraying children enjoying the product, but none as effective as their competitor's. One component of this home-use market where the United States does enjoy an advantage is in microwaveable products. Further attention to this niche should pay off as the percentage of households in Japan with microwaves is quickly catching that of the United States.

While nowhere near the size of the frozen French fry market, the other frozen potato product market, including product for both home and food service use, is the fastest growing in Japan. Between 1985 and 1989 U.S. French fry exports grew 113 percent while other frozen potato product exports to Japan grew 147 percent; and between 1988 and 1989 the percentages were 5 and 39 respectively. U.S. producers need to devote increasing attention both in product development and advertising to this sector of the market.

Hong Kong

Fast food and frozen French fries were made for Hong Kong, where the emphasis is on speed and convince. A booming manufacturing and transportation center, precariously perched on the edge of the People's Republic of China (PRC), Hong Kong has all the right factors for expanded exports of U.S. frozen potato products. Hong Kong's small land mass and large population mean that there is almost no local food production, therefore, imports are it. Recognizing this, the Government has no import restrictions or tariffs on food products. These cramped quarters also mean that cooking at home is difficult, and thus restaurants abound. In-fact, residents spend almost 50 percent of their food budget eating out.

The economic explosion during the past 5 years has provided the population with greater disposable incomes. This economic growth has come from hard work, which has put a premium on people's time. This need for speed can be seen in the prevalence of hand held cellular phones, which often times out number brief cases on downtown streets. The upcoming transition, in 1996, to People's Republic of China rule has added a bit of a "get it while you can" attitude to economic life in Hong Kong. With everyone working all the time, the time left for lunch and dinner becomes less and less.

The demand for fast food in Hong Kong is spurred on by a number of cultural influences, starting with its history as a colony and seaport, which sped the assimilation of western foods into everyday life. The expanding wealth has led to increased international travel and the corresponding exposure to new ideas and tastes. A further impetus for the adoption of western foods is that 56 percent of the 6 million inhabitants are under the age of 30. The large expatriate community, approximately 2.5 percent of the population, also provides a market for "foreign foods," as do the 4.5 million tourists who visited Hong Kong during 1987 alone.

All of these factors have contributed to increases in the number of fast food restaurants in Hong Kong and in the volume of U.S. frozen potato exports to supply them. Fast food outlets grew 146 percent between 1980 and 1987, and accounted for 12 percent of all restaurants, up from 8 percent. U.S. frozen potato product exports grew accordingly as the United States supplies close to 90 percent of the market, and frozen French fries account for 92 percent of U.S. frozen potato product exports to this market.

U.S. frozen potato exports to Hong Kong grew at an average annual rate of 19 percent between 1985 and 1988. The U.S. Bureau of the Census figure of 14,937 metric tons for 1989, is well out of line with this average growth. The unit value for 1989 of $359 per ton, well below the world average, is also suspect. Both of these factors lead one to believe that the tonnage figure is inaccurate. Using the world average unit value of $675 for 1989 and the value figure for Hong Kong of $5.4 million produces a more realistic export volume of 8,000 tons, which also is a 19 percent increase over 1988 export volume. Using this 8,000 ton figure, the increase in the volume of U.S. frozen potato exports to Hong Kong between 1980 and 1989 is 209 percent.

The U.S. potato industry has not allowed events alone to dictate the growth of U.S. frozen potato products to Hong Kong. During fiscal years 1986 to 1989 $554,192 in TEA funds were spent in conjunction with an equal amount of local and U.S. grower funds. Slightly over half of these funds have been spent on joint promotions with local as well as international fast food and restaurant chains. For fiscal year 1990 an additional $100,000 in TEA funds will be spent on these joint promotions. Unlike most of the other frozen potato product markets in the Far East, the United States also is a supplier of fresh potatoes to Hong Kong. However, unlike the the French fry market where the United States is the dominant source, in the fresh market the United States is a distant third behind China and the Netherlands. Through promotions it is hoped that a connection can be made between the high quality U.S. French fries being consumed and the Russet Burbank potato from the United States.

Given the inexorable link between Hong Kong and China it is not surprising that the events in Beijing during June, 1989 have had an impact on the economy of Hong Kong. The slow down in international economic activity with China has been directly felt in Hong Kong. Hong Kong's gross domestic product (GDP) growth during 1989 was only 3.1 percent compared with 7 percent in 1988 and 13.8 percent in 1987. U.S. frozen potato exports did not appear to be affected during 1989, however, if the economy continues at this slower pace, import growth will surely slow as well.

South Korea

South Korea probably holds as great a potential for growth in U.S. frozen potato exports as any country in the world. It is also, by far, the most uncertain market, with new problems and hurdles developing almost daily. The South Korean Government shutdown most of the imports of frozen potato products on July 1, 1985 by placing these products on the import surveillance list. On July 1, 1988 these products were removed from the surveillance list, allowing free entry of the product. Continued problems with Customs clearance and product safety investigations have plagued the trade since that opening. Despite these problems the United States exported 2,769 tons of frozen potato products to South Korea during 1989, of which 93 percent were frozen French fries.

Many of the same factors contributing to the growth of U.S. frozen potato product exports to the rest of the Far East also exist in South Korea, but with some important cultural differences. As shown in the table on "Factors Affecting..." the South Korean economy has had the highest growth of any of the countries sampled. The number of new cars caught in the traffic jams in Seoul attests to this tremendous increase in personal spending power for much of the population. Despite the devaluation of the South Korean won during the first five years of the past decade, it has regained much of its previous value against the dollar during the last five. Overall this means that the won price of U.S. products has been affected very little by fluctuations in exchange rates.

The effect of these positive economic factors on the South Korean market are tempered by a cultural preference for domestic products, especially food products. This preference for domestic products even appears to be the case for domestically produced frozen potato products which are of poor quality due to the variety of potato grown in Korea. Further resistance to imported food products comes from the domestic farm sector, which employs a large percentage of the population, and thus, has strong political power. Farm sector support comes from price protection carried out, for the most part, via import restrictions. While these protectionist policies seem out of line with South Korea's export based economy, it becomes more understandable when one goes into the countryside, and finds that very little of the economic improvements have actually gone beyond the major cities.

The future of U.S. frozen potato product exports to South Korea depends on which influences on the market win out. If the demand side is able to withstand the nationalist pressures, Korea should continue to grow as a market for U.S. frozen potato products. The $100,000 in TEA funds budgeted for this market for fiscal year 1990 should help the cause. The bulk of these funds will go to joint promotions with fast food and restaurant chains, while $30,000 will be spent on public relations.

NATIONAL POTATO PROMOTION BOARD TEA EXPENDITURES 1/

Country/ Fiscal Year 2/	---TEA Expenditures by Type of Activity--- Consumer	Trade	Joint Promo	Total
Japan				
1986	1,625,068	65,684	50,000	1,740,752
1987	1,309,200	179,981	226,979	1,716,160
1988	1,134,780	151,194	212,400	1,498,374
1989	2,005,984	177,449	166,985	2,350,418
Total	6,075,032	574,308	656,364	7,305,704
Singapore				
1986	0	4,412	38,000	42,412
1987	99,693	0	111,227	210,920
1988	89,044	13,022	107,802	209,868
1989	32,213	0	59,844	92,057
Total	220,950	17,434	316,873	555,257
Malaysia				
1986	0	1,801	50,000	51,801
1987	0	0	74,943	74,943
1988	9,231	0	70,046	79,277
1989	0	0	120,000	120,000
Total	9,231	1,801	314,989	326,021
Indonesia				
1987	5,000	0	9,000	14,000
1988	0	5,000	24,000	29,000
1989	0	15,371	11,000	26,371
Total	5,000	20,371	44,000	69,371
Hong Kong				
1986	0	14,910	41,026	55,936
1987	79,646	12,000	91,289	182,935
1988	90,565	846	87,233	178,644
1989	63,280	8,400	64,997	136,677
Total	233,491	36,156	284,545	554,192
Taiwan				
1986	10,000	0	0	10,000
1987	15,000	0	67,565	82,565
1988	1,635	10,000	75,000	86,635
1989	90,300		120,000	210,300
Total	116,935	10,000	262,565	389,500
South Korea				
1989	10,000	2,872	40,000	52,872
Philippines				0
1989	0	0	20,000	20,000

1/ Figures are for U.S. government TEA funds only and do not include U.S. grower or foreign participant contributions.
2/ The expenses for 1989 are incomplete as the NPPB has until the end of fiscal year 1990 to submit claims for 1989.

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FRENCH WALNUT INDUSTRY

Introduction

France is the fourth largest producer of walnuts in the world after the United States, China, and Turkey. It is also the leading producer of walnuts in the European Community. Production of walnuts in France has remained relatively stable during the last few years. France, in addition to being a major exporter, is also among the top importers of walnuts in the world.

WALNUTS: PRODUCTION, SUPPLY AND DISTRIBUTION IN FRANCE[1]
(INSHELL BASIS, METRIC TONS)

YEAR	Beginning Stocks	Production	Imports	TOTAL SUPPLY	Exports	Domestic Consumption	Ending Stocks	TOTAL DISTRIBUTION
1980/81	0	21,000	3,800	24,800	8,000	16,500	300	24,800
1981/82	300	10,000	11,350	21,650	5,870	15,780	0	21,650
1982/83	0	31,000	1,900	32,900	11,100	14,800	7,000	32,900
1983/84	7,000	18,000	2,300	27,300	11,500	15,800	0	27,300
1984/85	0	14,200	7,700	21,900	8,800	13,100	0	21,900
1985/86	0	23,300	4,500	27,800	9,300	18,500	0	27,800
1986/87	0	27,900	6,600	34,500	10,700	23,800	0	34,500
1987/88	0	26,500	6,700	33,200	11,500	21,700	0	33,200
1988/89	0	21,500	11,400	32,900	10,900	22,000	0	32,900
1989/90	0	26,200	8,000	34,200	11,500	22,700	0	34,200

[1] October-September marketing year. For 1989/90, production and beginning stocks figures are estimates while all other figures are forecasts.

As shown in the table, except for a few unusually low years, French imports and exports of walnuts have not changed drastically during the 1980's. During the marketing year 1988/89, France exported 3,756 metric tons of inshell walnuts and 2,107 tons of shelled walnuts. West Germany is the most important export market for French walnuts, followed by Switzerland and Portugal. On the import side, the quantity of shelled walnut imports exceeds that of inshell walnuts. According to 1988/89 statistics, the United States is the primary source of French inshell walnuts imports, supplying 2,765 tons out of a total of 2,965 tons. China and India are the major suppliers of shelled walnuts, accounting for over 61 percent of total imports. Similarly, consumption has remained relatively stable in France over the past few years. The French walnut industry is going through a renovation and expansion phase, the ultimate outcome of which will also influence U.S. export of walnuts to its major market, the EC.

FRANCE: SHELLED WALNUT EXPORTS, BY DESTINATION
Metric Tons, Calendar Years

COUNTRIES/YEARS	1984	1985	1986	1987	1988
WEST GERMANY	804	856	997	1,081	1,207
SWITZERLAND	331	362	338	447	528
BELGIUM/LUX.	164	167	202	211	276
NETHERLANDS	260	223	226	211	229
DENMARK	152	148	160	196	202
OTHER	170	143	163	241	200
TOTAL	1,881	1,899	2,086	2,387	2,642

SOURCE: Statistical Office of the EC, Luxembourg

FRANCE: INSHELL WALNUT EXPORTS, BY DESTINATION
Metric Tons, Calendar Years

COUNTRIES/YEARS	1984	1985	1986	1987	1988
WEST GERMANY	964	1,379	1,546	1,429	1,185
PORTUGAL	12	76	247	726	819
SWITZERLAND	639	707	734	644	714
BELGIUM/LUX.	862	762	368	689	854
SPAIN	1,018	886	1,121	915	309
ITALY	64	35	101	46	117
DENMARK	102	216	134	159	110
OTHER	353	225	331	877	178
TOTAL	4,014	4,286	4,582	5,485	4,286

SOURCE: Statistical Office of the EC, Luxembourg

FRANCE: SHELLED WALNUT IMPORTS, BY ORIGIN
Metric Tons, Calendar Years

COUNTRIES/YEARS	1984	1985	1986	1987	1988
INDIA	225	691	319	679	623
CHINA	0	15	211	244	583
HUNGARY	354	392	280	424	321
ITALY	128	133	105	76	196
TURKEY	2	30	12	58	148
UNITED KINGDOM	83	66	171	305	135
OTHER	78	299	172	333	420
TOTAL	870	1,626	1,270	2,119	2,426

SOURCE: Statistical Office of the EC, Luxembourg

FRANCE: INSHELL WALNUT IMPORTS, BY ORIGIN
Metric Tons, Calendar Years

COUNTRIES/YEARS	1984	1985	1986	1987	1988
USA	1,587	1,841	1,168	1,176	1,199
WEST GERMANY	83	113	47	194	550
NETHERLANDS	19	46	21	69	313
ITALY	274	83	36	7	45
HUNGARY	76	36	65	49	20
OTHER	314	118	124	85	56
TOTAL	2,353	2,237	1,461	1,580	2,183

SOURCE: Statistical Office of the EC, Luxembourg

Background

The history of walnuts in France can be traced back to at least the 11th century. At that time walnuts were harvested in the valley of the Isere river in southeastern France. Centuries old walnut growing tradition has left its traces in village names such as Noyarey (which means walnut grove). Records from the year 1730 show that the whole countryside was covered with walnut trees. In the 19th century, walnuts became an intensively farmed crop, replacing silkworm breeding and wine making as the principal agricultural activity. The tradition of walnut harvesting continues today in the southeastern and southwestern France with each region claiming superiority in quantity and quality. In fact the two regions differ from each other in organizational structure and the types of product marketed.

Production Regions

According to the French government, 60 percent of the walnuts are produced in the southwest while 40 percent of the production comes from the southeast. The producers in both regions can be classified as 1) extensive producers who primarily own scattered trees of walnuts and use family labor for various stages of production and harvesting or 2) Specialized producers who own large orchards and are involved in intensive production. These categories are more distinct in southwestern France, whereas in the the southeast there is preponderance of specialized producers.

Before the EC tree nut program was implemented, about 50 percent of French walnut production was controlled by organized groups. In the southeast, however, organized groups control a significant part of the production. The French Ministry of Agriculture has had a policy to promote formation of producer organizations with financial assistance. In addition to the cooperatives and syndicated groups, in the southeast, there is a technical group, the interprofessional industry association (C.I.N.G.), that overseas and helps all producer groups. The administrator of this group is appointed by the government which gives the government some control over at least the research and technical aspects of the walnut industry.

In the southwest there are 15 small groups of producers who control less than half of the total production in the region. Until the implementation of the new EC tree nut program, there had not been any group in the southwest, formally recognized by the government. All organizations have been privately formed and operated.

Another difference between the southwest and southeast regions is the type of product each region markets. Most of the walnuts marketed in the southwest are shelled. In this region some walnuts are also consumed fresh, i.e., before the shell is hard, approximately 3 weeks prior to the harvest time. In the southeast most of the walnuts are marketed inshell.

Marketing

Most of the walnut crop is handled through traditional marketing channels. Producers sell the crop to merchants or traders who either pack or process it for shelling and then sell it to wholesalers. Some of these traders also are processors who shell the nuts before selling them to the wholesalers. Some of the walnut crop is sold through cooperatives directly to the retailers. Most of the traders who trade in walnuts do not handle walnuts exclusively but deal with a wide range of commodities.

Research

The government of France encourages research into methods of improving yields and quality of several fruit and vegetables produced in the country. Most of the research on such products is conducted by the Technical Center for Fresh Fruits and Vegetables (C.T.I.F.L.). C.T.I.F.L. has research centers located in various parts of France. There are four such research stations, two in the southeast and two and southwest, that are involved in production and quality improvement research on walnuts.

These research and experiment stations are involved in the following:

- the study of varieties
- experimenting with new pruning and harvesting techniques
- irrigation and fertilization
- improving yields through control over other standard cultural practices
- trials on rootstock
- improvement of walnut drying techniques using alternative sources of energy in order to increase efficiency of drying and packing plants.

The research stations are testing the traditional varieties grown in France and hybrid varieties which have been developed in France. The French scientists claim that these hybrid varieties will be high yielding like the California varieties of walnuts while retaining the flavor and taste of traditional French walnuts.

The size of trees of the hybrid varieties being tested is such that it may be possible to increase the number of trees planted per acre by 3 to 4 times. It is expected that hybrid varieties will yield 6 to 7 tons of walnuts per acre compared with an average of 1 to 3 tons with the traditional varieties. Traditional French varieties bear fruit in 7 to 10 years while the new varieties will bear fruit in 4 to 5 years.

Although initial investment on the new varieties may be greater, potential returns from them are much greater as well. The research centers working on walnuts also are experimenting with irrigation methods. The researchers expect that the new varieties will be less costly to irrigate as they need smaller release of water quantity per hour.

Since the new varieties are such that they will need to be irrigated and would also involve mechanized harvesting, most of them will have to planted on flat land. Currently, many small orchards of walnuts are planted on hilly terraces, especially in the southwest. Hence, most of the existing walnut growers will try to improve yield of the traditional varieties, which the researchers feel can be doubled using the practices and harvesting techniques tried at the research centers. A few orchards which are on flatter land and are larger in size may be renovated with new varieties. The new varieties in many cases are expected to be planted on additional acreage, where the cultural practices tried on the research centers can be performed.

The question arises as to what, if any, role will the EC tree nut program play in this research and expansion of production of walnuts in France? This question becomes even more important in light of the fact that according to this program, funds will not be provided for any new additions to the area under walnut production.

The current research project on walnut production started at least two years before the EC tree nut program originally was considered by the EC council in Brussels. The Ministry of Agriculture and the walnut growers initiated the research in response to the need to improve returns to growers. The EC tree nut program has come at an opportune time for the French walnut industry. Some funds from the EC program are expected to be used in these research centers.

There are three main sources of funds for the research conducted at the research stations:

1. French government and EC funds
2. Funds provided by various producer organizations, where the member producers pay into the research fund of the organization.
3. Funds provided by the regional level authorities. (Southwest and southeast both have supporting funds for C.T.I.F.L. research.)

Money made available to producer organizations by the EC under the new tree nut program will easily flow into these research projects under the second category above. The EC funds could help the growers to increase production through two channels; directly, by funding research to develop high yielding varieties, and financing of renovation of existing orchards. The indirect channel of assistance is the information and spillover the research could have by encouraging the planting of new orchards with these varieties. The EC program will provide no additional help for production and marketing of nuts produced on the additional acreage.

The research centers also are experimenting with the existing varieties to determine where they could help growers increase yield on the existing orchards. There will be better marketing structure and product awareness in general, for all the additional output including nuts produced in newly planted orchards.

Although French officials disagree with this position, trade sources indicate that walnut production in France may double over the next 10 to 15 years. If French production does leap ahead, it will be partly due to the EC tree nut program but primarily due to the other initiatives taken by the French Ministry of Agriculture to help the walnut sector.

French Walnut Industry and the EC Tree Nut Program

France was not among the countries that initiated the EC treenut program proposal. However, the objectives of the program are similar to those the French Ministry of Agriculture has tried to implement in the walnut sector for some time. The French government has always encouraged the formation of producer organizations, which also is at the heart of the EC program.

The French government has the authority to approve or disapprove applications for recognition filed by individual organizations. The government intends to use this authority to encourage the formation of organizations, the way it would like them to be formed. For example, government sources indicate that only those producer organizations that also are involved in intensive marketing will be recognized. French and EC officials view Blue Diamond Growers of California as a model and would like their organizations to operate on similar lines. Many producers presently belong to organizations that are not involved in marketing. Such organizations will be encouraged to modify their activity.

The French government might use EC tree nut program funds to finance programs that were subsidized with French Government funds before the EC tree nut program was implemented. French national government subsidies to walnut growers have consisted primarily of aid granted for the planting and renovation of orchards and for the purchase of equipment. In 1988 the planting subsidy for walnut orchards was about 10 percent of planting costs. The aid is given only to farms that belong to a group or organization. Although there is no limit on the size of the organization, the individual farm must be at least one-half acre in size to be eligible for the French government aid. In essence the net increase in the money available to producers to carry out various activities may be smaller than what it could be if the government did not discontinue some of its own programs. For details on the EC tree nut program, see the February 1990 issue of Horticultural Products Review.

Conclusion

There is a possibility of increased production of walnuts in France during the next 10 to 15 years. There is sufficient area available in both regions to permit expansion of acreage. Also, only about 10 percent of walnut orchards in the southwest are irrigated. As growers shift towards the high yielding varieties, use of irrigation and other technology will increase. There is also a trend towards increasing the quantity of shelled walnuts marketed. This will mean increased supply of French walnuts for processed food markets. The impact of the EC tree nut program is still unclear. The initial reaction from the government officials and growers indicates active participation and hence an expectation of increases in yield and total production in the near future.

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MONTHLY EXCHANGE RATES FOR SELECTED FOREIGN CURRENCIES
February 23, 1990
(Foreign Currency Units Per U.S. Dollar)

Currencies	2/23/90 Current Rate	1/23/90 Month Ago Rate	2/89 Year Ago Avg.	2/88 Two Year Ago Avg.
Canadian Dollar	1.1980	1.1775	1.1886	1.2679
ECU 1/	0.8187	0.8377	0.8892	0.8215
British Pound	0.5848	0.6055	0.5703	0.5691
French Franc	5.6840	5.7690	6.3024	5.7319
West German Mark	1.6780	1.6970	1.8513	1.6969
Japanese Yen	147.1000	145.7400	127.7200	129.1700
South Korean Won	685.7000	673.8000	678.9830	777.2650
New Taiwan Dollar	25.9500	25.9400	27.6430	28.5650
Singapore Dollar	1.8650	1.8810	1.9270	2.0162
Hong Kong Dollar	7.8080	7.8095	7.7992	7.7954

1/ European Currency Unit. A weighted basket of the currencies of the 12 EC member states.
Exchange rates are spot as of 3 p.m. Eastern Time, February 23, 1990.
Source: FAS/TEID Exchange Rate Database and Wall Street Journal.

BRAZILIAN CITRUS UPDATE

Orange production in the Brazilian State of Sao Paulo during the 1989 season is now estimated at a record 290 million boxes (90 pounds or 40.8 kilograms), 10 million above the previous USDA estimate and 40 million above early season expectations. Below normal rainfall July through mid-October 1988 did result in a disappointing fruit set from the first bloom (August-September), but subsequent rainfall beginning in late October resulted in successful follow-up blooms with trees ending up carrying a larger number of oranges than in recent years. Improved grove care and favorable weather during the growing season resulted in excellent tree yields. Additionally, many growers made special efforts to minimize fruit drop and harvest out-of-season fruit for processing following the Florida freeze this past December. Rains in late December and into January delayed harvesting somewhat. As of mid-February, approximately 95 percent of the crop had been harvested with completion anticipated in March.

The increased fruit availability together with a strengthened export demand for frozen concentrated orange juice resulting from the Florida freeze will push total Brazilian utilization of oranges for processing to 10.5 million tons (257.3 million boxes) compared to 7.4 million tons a year earlier. The USDA estimate for Brazilian orange juice production during the 1989 season has been increased by 50,000 tons to 975,000 tons at 65 degree brix. Juice production could have been higher if not for late season rains which adversely affected overall season average processing yields.

Orange juice exports by Brazil during the 1989/90 marketing season (July-June) is estimated at a record 925,000 tons. Some trade sources believe that shipments during the period could go as high as 950,000 tons. Brazilian exporters anticipate that the United States and Canada could take nearly 550,000 tons of the total shipping volume. An additional 330,000 tons should be destined for markets in Western Europe along with 60,000 to 70,000 tons sold in Asia and the Middle East.

According to data supplied by the Bank of Brazil for the July through November period and private trade sources for December 1989 and January 1990, export shipments of orange juice during July 1989-January 1990 totaled nearly 570,000 tons. In order for the export forecast of 925,000 tons to be reached, Brazilian orange juice shipments must average 70,000 tons monthly over the remaining five months of the 1989/90 marketing year. This figure is 10,000 tons below the monthly average set during the first 7 months of the season and less than half of the record 145,000 tons reportedly shipped in January. More than 50 percent of January's movement went in drums which would enhance storage flexibility at destination.

The export price of Brazilian orange juice increased dramatically following the freeze in Florida. Export price quotes prior to the freeze in December 1989 ranged from $1,350 to $1,450 per ton, f.o.b. port of Santos. Price quotations in early February had increased to approximately $2,400 per ton. Increases in export prices have been in line with upward adjustments in Brazil's minimum export price. This minimum export price is set by the Bank of Brazil and represents the minimum value that an exporter must state on his export declaration, and therefore the amount of dollars that must be turned over to the Brazilian Government for conversion to local currency. On December 26, 1989, the minimum export price was set at $1,120 per ton.

Brazil had tied the minimum export price to a formula based on quotations from the previous running 20 day average of New York orange juice future prices. This system therefore had a significant lag built into it for the minimum export price to catch up with a sudden and sharp swing in market prices as reflected by future contract price levels. In order to compensate for this price lag, the minimum export price was revised to $1,470 per ton on January 3 and made subject to $10 daily increases until it reaches the absolute daily value of New York futures. As of February 9, the Brazilian minimum export price was fixed at $2,070 per ton.

BRAZIL: SUPPLY AND DISTRIBUTION OF ORANGES AND FCOJ*

ITEM	1984	1985	1986	1987	1988	1989
Oranges, Sao Paulo	Million Boxes**					
Production[1]	205	239	220	220	210	290
Fresh Consumption	18	17	48	38	33	38
Fresh Exports	2	2	2	2	2	2
Processed	185	220	170	180	175	250
FCOJ, Brazil	1,000 Metric Tons, 65 Degrees Brix[2]					
Beginning Stocks	35	44	202	86	38	24
Production						
Sao Paulo	768	860	592	690	690	950
Other States	16	15	11	20	23	25
Total	784	875	603	710	713	975
Total FCOJ SUPPLY	819	919	825	796	751	999
Domestic Consumption	10	15	20	20	20	20
Export Shipments[3]						
Sao Paulo	749	687	688	718	684	900
Other States	16	15	11	20	23	25
Total	765	702	699	738	707	925
Ending Stocks	44	202	86	38	24	54
SAO PAULO FCOJ YIELDS						
Kilograms 65 Brix/Box	4.15	3.91	3.48	3.83	3.94	3.80
Boxes/MT 65 Brix FCOJ	241	256	287	261	254	263
42 Brix Gal./Box	1.43	1.35	1.20	1.32	1.36	1.31

* Harvesting and processing usually begin in late April or early May. The marketing season for FCOJ begins on July 1 of year indicated. ** 40.8 kg. or 90 pounds. [1]Includes oranges produced in Sao Paulo's commercial citrus zone, plus tangerines and tangors used for processing. [2]One metric ton at 65 brix equals 344.8 gallons at 42 degrees brix. [3]Includes tangerine juice.

The end-of-season juice inventory for June 30, 1990, is forecast at 54,000 tons, more than double the level of a year earlier but 35,000 to 60,000 tons below early season forecasts. This stock level represents less than 6 percent of the 1989 season's export shipments and only slightly more than the minimum level required to carry forward into the 1990 season for blending with early-season new-crop juice.

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WALNUTS: PRODUCTION, SUPPLY & DISTRIBUTION, LEADING COUNTRIES
(METRIC TONS, INSHELL BASIS)

COUNTRY YEAR[1]	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
CHINA (MAINLAND)								
1987/88	0	147,000	0	147,000	38,400	108,600	0	147,000
1988/89	0	177,100	0	177,100	47,300	129,800	0	177,100
1989/90	0	151,000	0	151,000	40,000	111,000	0	151,000
FRANCE								
1987/88	0	26,500	6,700	33,200	11,500	21,700	0	33,200
1988/89	0	21,500	11,400	32,900	10,900	22,000	0	32,900
1989/90	0	26,200	8,000	34,200	11,500	22,700	0	34,200
INDIA								
1987/88	3,480	20,000	0	23,480	11,000	11,000	1,480	23,480
1988/89	1,480	17,000	0	18,480	9,000	9,000	480	18,480
1989/90	480	17,000	0	17,480	8,000	9,200	280	17,480
ITALY								
1987/88	100	20,000	7,021	27,121	2,343	19,278	5,500	27,121
1988/89	5,500	11,000	9,500	26,000	2,500	22,000	1,500	26,000
1989/90	1,500	18,000	9,000	28,500	3,000	23,000	2,500	28,500
TURKEY								
1987/88	5,000	65,000	0	70,000	2,000	62,000	6,000	70,000
1988/89	6,000	64,000	0	70,000	4,000	61,000	5,000	70,000
1989/90	5,000	62,000	0	67,000	4,000	59,000	4,000	67,000
UNITED STATES								
1987/88	32,909	224,075	549	257,533	72,706	118,329	66,498	257,533
1988/89	66,498	189,600	189	256,287	77,343	124,329	54,615	256,287
1989/90	54,615	195,045	100	249,760	85,000	127,431	37,327	249,760
TOTAL								
1987/88	41,489	502,575	14,270	558,334	137,949	340,907	79,478	558,334
1988/89	79,478	480,200	21,089	580,767	151,043	368,129	61,595	580,767
1989/90	61,595	469,245	17,100	547,940	151,500	352,327	44,113	547,940

[1]Marketing years are as follows: Aug.-July for the United States; Sept.-Aug. for Italy, Syria, and Turkey; Oct.- Sept. for China, France, and India.

PISTACHIOS: PRODUCTION, SUPPLY & DISTRIBUTION, SELECTED COUNTRIES
(METRIC TONS, INSHELL BASIS)

COUNTRY YEAR[1]	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
GREECE								
1987/88	30	4,030	100	4,160	35	3,000	1,125	4,160
1988/89	1,125	3,000	10	4,135	15	3,100	1,020	4,135
1989/90	1,020	3,500	10	4,530	100	3,300	1,130	4,530
ITALY								
1987/88	1,400	4,000	5,159	10,559	1,434	6,025	3,100	10,559
1988/89	3,100	300	5,999	9,399	1,610	6,789	1,000	9,399
1989/90	1,000	3,300	7,000	11,300	2,000	7,700	1,600	11,300
SYRIA								
1987/88	760	12,500	1,000	14,260	0	14,000	260	14,260
1988/89	260	17,900	500	18,660	500	15,000	3,160	18,660
1989/90	3,160	18,000	500	21,660	1,000	16,000	4,660	21,660
TURKEY								
1987/88	18,000	25,000	0	43,000	7,000	20,000	16,000	43,000
1988/89	16,000	15,000	0	31,000	3,000	18,000	10,000	31,000
1989/90	10,000	30,000	0	40,000	5,000	22,000	13,000	40,000
UNITED STATES								
1987/88	11,657	15,010	2,258	28,925	4,926	18,622	5,377	28,925
1988/89	5,377	42,640	971	48,988	8,625	25,936	14,427	48,988
1989/90	14,427	17,690	5,500	37,617	8,600	23,017	6,000	37,617
TOTAL								
1987/88	31,847	60,540	8,517	100,904	13,395	61,647	25,862	100,904
1988/89	25,862	78,840	7,480	112,182	13,750	68,825	29,607	112,182
1989/90	29,607	72,490	13,010	115,107	16,700	72,017	26,390	115,107

[1]Marketing years are as follows: Sept.-Aug. for Italy, Syria, the United States; Oct.-Sept. for Greece and Turkey.

ALMONDS: PRODUCTION, SUPPLY & DISTRIBUTION, LEADING COUNTRIES
(METRIC TONS, SHELLED BASIS)

COUNTRY YEAR[1]	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
GREECE								
1987/88	353	8,500	2,500	11,353	500	8,040	2,813	11,353
1988/89	2,813	19,000	160	21,973	5,800	14,000	2,173	21,973
1989/90	2,173	16,300	1,000	19,473	4,000	13,800	1,673	19,473
ITALY								
1987/88	3,500	12,000	11,705	27,205	3,008	18,197	6,000	27,205
1988/89	6,000	14,000	10,550	30,550	5,142	19,408	6,000	30,550
1989/90	6,000	18,000	9,000	33,000	6,000	21,000	6,000	33,000
MOROCCO								
1987/88	600	6,280	0	6,880	1,262	5,018	600	6,880
1988/89	600	7,417	0	8,017	1,150	6,267	600	8,017
1989/90	600	8,500	0	9,100	2,000	6,500	600	9,100
PORTUGAL								
1987/88	195	2,700	662	3,557	534	2,028	995	3,557
1988/89	995	1,400	920	3,315	420	2,100	795	3,315
1989/90	795	2,500	500	3,795	1,000	2,150	645	3,795
SPAIN								
1987/88	14,245	65,000	5,400	84,645	16,600	30,000	38,045	84,645
1988/89	38,045	40,000	4,900	82,945	14,500	30,000	38,445	82,945
1989/90	38,445	90,000	1,000	129,445	35,000	30,000	64,445	129,445
TURKEY								
1987/88	4,000	10,000	0	14,000	1,000	11,000	2,000	14,000
1988/89	2,000	13,000	0	15,000	1,000	12,000	2,000	15,000
1989/90	2,000	15,000	0	17,000	1,000	13,000	3,000	17,000
UNITED STATES								
1987/88	35,842	299,370	288	335,500	155,718	75,323	104,459	335,500
1988/89	104,459	267,620	733	372,812	165,051	84,530	123,231	372,812
1989/90	123,231	217,725	800	341,756	130,000	97,597	114,159	341,756
TOTAL								
1987/88	58,735	403,850	20,555	483,140	178,622	149,606	154,912	483,140
1988/89	154,912	362,437	17,263	534,612	193,063	168,305	173,244	534,612
1989/90	173,244	368,025	12,300	553,569	179,000	184,047	190,522	553,569

[1]Marketing years are as follows; July-June United States, Morocco; Aug.-July Portugal; Sept-Aug. Spain, Italy, Turkey; Oct.-Sept Greece;
Note: U.S. Census Bureau Export figures do not match PS&D tables, due to variations in actual dates of shipment.

HAZELNUTS: PRODUCTION, SUPPLY & DISTRIBUTION, LEADING COUNTRIES
(METRIC TONS, INSHELL BASIS)

COUNTRY YEAR[1]	BEGINNING STOCKS	PRODUCTION	IMPORTS	TOTAL SUPPLY	EXPORTS	DOMESTIC CONSUMPTION	ENDING STOCKS	TOTAL DISTRIBUTION
ITALY								
1987/88	11,000	90,000	24,035	125,035	55,133	53,902	16,000	125,035
1988/89	16,000	140,000	16,642	172,642	85,045	57,597	30,000	172,642
1989/90	30,000	120,000	18,000	168,000	90,000	60,000	18,000	168,000
SPAIN								
1987/88	3,000	32,000	590	35,590	13,560	10,200	11,830	35,590
1988/89	11,830	18,000	400	30,230	13,350	11,000	5,880	30,230
1989/90	5,880	23,000	200	29,080	11,000	11,000	7,080	29,080
TURKEY								
1987/88	50,000	280,000	0	330,000	199,000	91,000	40,000	330,000
1988/89	40,000	420,000	0	460,000	231,000	129,000	100,000	460,000
1989/90	100,000	460,000	0	560,000	280,000	180,000	100,000	560,000
UNITED STATES								
1987/88	2,204	19,780	4,450	26,434	6,549	16,911	2,974	26,434
1988/89	2,974	14,970	10,364	28,308	4,306	20,467	3,535	28,307
1989/90	3,535	11,795	10,500	25,830	3,950	19,158	2,722	25,829
TOTAL								
1987/88	66,204	421,780	29,075	517,059	274,242	172,013	70,804	517,059
1988/89	70,804	592,970	27,406	691,180	333,701	218,064	139,415	691,180
1989/90	139,415	614,795	28,700	782,910	384,950	270,158	127,802	782,910

[1]Marketing years are as follows: Aug.-July United States; Sept.- Aug. Spain, Italy, Turkey.
Note: U.S. Census Bureau Export figures do not match PS&D tables, due to variations in actual dates of shipment.

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
MARKETING YEAR BEGINNING AS INDICATED
DEC 89

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY CURR MO LAST YR	QUANTITY CURR MO CURR YR	QUANTITY YR TDT LAST YR	QUANTITY YR TDT CURR YR	QUANTITY LAST YEAR	VALUE (000 DOLLARS) CURR MO LAST YR	VALUE CURR MO CURR YR	VALUE YR TDT LAST YR	VALUE YR TDT CURR YR	VALUE LAST YEAR
FRESH FRUIT											
FR. APPLES(JUL)	MT										
CANADA		4,103	3,860	23,119	22,671	51,541	2,216	1,992	12,402	11,648	27,064
TAIWAN		9,315	11,305	30,845	33,980	46,040	4,549	5,334	15,530	16,077	23,268
HONG KONG		2,554	4,685	11,238	18,368	27,258	1,220	2,404	5,533	8,934	13,233
EC 12		4,446	2,568	11,366	12,048	24,291	2,073	1,263	5,705	5,555	12,287
UNITED KINGDOM		2,210	1,678	7,886	8,251	18,300	1,141	781	4,122	4,106	9,417
SWEDEN		5,915	1,917	11,377	5,204	14,466	2,562	653	4,741	1,761	6,031
OTHER		13,342	19,559	56,509	71,047	85,643	6,954	10,037	28,536	35,840	44,709
Subtotal:------		39,675	43,894	144,453	163,318	249,238	19,574	21,684	72,447	79,815	126,591
FR AVOCADOS(OCT)	MT										
EC 12		396	34	1,002	493	3,491	422	40	1,193	609	4,477
UNITED KINGDOM		90	15	372	248	1,635	102	19	414	285	2,209
CANADA		66	52	197	260	1,613	101	81	322	368	2,509
JAPAN		32	0	33	16	1,242	37	0	42	35	1,705
FRANCE		99	14	105	64	768	115	14	121	63	935
NETHERLANDS		179	0	453	103	689	175	0	580	161	855
OTHER		49	8	255	16	866	91	12	418	24	1,164
Subtotal:------		542	94	1,486	785	7,213	651	133	1,976	1,036	9,856
FR. PEARS(JUL)	MT										
CANADA		2,379	2,443	15,785	15,705	27,477	1,189	1,192	7,824	7,889	13,539
MEXICO		464	2,673	1,302	10,860	11,225	214	1,176	582	4,821	4,662
SWEDEN		3,017	2,594	7,416	6,220	10,602	1,255	865	3,212	2,153	4,480
OTHER		2,534	3,946	8,221	13,256	11,498	1,374	2,053	4,292	6,952	5,846
Subtotal:------		8,395	11,656	32,723	46,042	60,802	4,031	5,286	15,910	21,814	28,526
FR GRAPES(JUN)	MT										
CANADA		3,567	2,847	60,628	52,041	73,786	2,964	2,637	51,193	47,260	63,116
HONG KONG		2,257	1,679	15,244	18,708	18,055	2,060	1,458	15,283	16,454	17,569
TAIWAN		859	678	11,716	11,795	12,762	803	545	11,136	11,210	12,160
OTHER		5,492	3,585	29,920	32,592	33,586	5,471	4,363	35,375	38,005	39,328
Subtotal:------		12,175	8,789	117,507	115,136	138,188	11,298	9,003	112,988	112,929	132,173
FR KIWIFRUIT(OCT)	MT										
CANADA		558	322	1,496	1,986	4,885	585	283	1,444	1,816	4,994
TAIWAN		39	53	533	208	1,407	59	106	987	425	2,496
FINLAND		155	0	155	0	900	247	0	247	0	1,426
EC 12		72	0	244	0	679	127	0	373	0	1,009
NETHERLANDS		15	0	186	0	585	11	0	256	0	821
JAPAN		16	0	16	17	522	35	0	35	19	954
OTHER		306	129	393	343	1,708	368	1[illegible]2	493	522	2,268
Subtotal:------		1,146	504	2,837	2,554	10,100	1,421	570	3,579	2,783	13,148
FR STRAWBRIS(JAN)	MT										
CANADA		105	136	9,367	10,401	9,367	238	244	19,421	18,959	19,421
JAPAN		0	1	3,027	3,372	3,027	0	6	13,623	13,961	13,623
EC 12		114	5	787	910	787	260	15	1,704	1,787	1,704
OTHER		8	16	730	1,764	730	33	28	1,835	3,592	1,835
Subtotal:------		227	158	13,911	16,446	13,911	531	293	36,584	38,299	36,584
FR CHERRIES(MAY)	MT										
JAPAN		1	0	14,383	11,142	14,383	3	0	40,319	40,398	40,319
CANADA		118	36	5,703	7,112	5,745	130	45	6,843	9,397	6,870
EC 12		139	80	2,684	3,857	2,748	153	70	5,313	7,645	5,383
UNITED KINGDOM		2	43	1,988	3,109	1,988	2	26	4,499	6,354	4,499
OTHER		8	20	2,915	4,677	2,931	14	30	5,660	8,102	5,692
Subtotal:------		266	136	25,686	26,788	25,808	300	145	58,135	65,542	58,265
FR ORNG INC TMPL(NOV)	MT										
JAPAN		5,101	2,201	8,143	10,619	118,765	3,586	1,620	5,922	8,128	80,986
HONG KONG		4,147	8,392	9,771	13,909	101,958	1,691	4,375	4,254	7,315	51,432
CANADA		9,175	6,920	17,136	13,108	89,428	4,698	4,447	8,818	8,621	52,451
OTHER		4,649	5,308	6,501	7,870	57,178	2,723	3,014	3,949	4,742	30,584
Subtotal:------		23,073	22,822	41,551	45,506	367,329	12,699	13,457	22,943	28,805	215,454
FR GRPFRT(SEP)	MT										
JAPAN		11,022	10,301	29,822	42,516	259,109	5,641	5,982	16,384	23,873	132,282
EC 12		11,500	12,052	43,311	42,740	139,704	4,683	5,870	18,482	20,765	60,657
FRANCE		3,121	5,660	15,193	19,530	61,176	1,374	2,573	6,630	9,146	25,676
NETHERLANDS		3,648	3,366	15,720	10,301	41,095	1,448	1,822	6,707	5,258	16,682
TAIWAN		342	401	1,213	478	32,214	156	178	534	226	15,794
CANADA		3,474	2,276	10,537	7,449	27,077	1,430	1,471	4,620	4,991	13,841
OTHER		1,820	1,032	4,204	2,876	19,776	988	542	2,259	1,530	9,933
Subtotal:------		28,159	26,063	89,088	96,059	477,880	12,897	14,043	42,279	51,384	232,508
FR TANGERINES(NOV)	MT										
CANADA		1,343	796	4,022	1,848	9,324	707	647	2,118	1,495	6,269
EC 12		0	18	0	18	8,987	0	8	0	8	4,456
NETHERLANDS		0	0	0	0	4,370	0	0	0	0	1,949
FRANCE		0	0	0	0	2,803	0	0	0	0	1,493
OTHER		26	75	97	232	1,701	16	110	59	271	828
Subtotal:------		1,369	889	4,119	2,097	20,012	723	765	2,177	1,774	11,553
CANNED FRUIT											
CND PEACH&NECT(JUN)	MT										
JAPAN		277	588	4,438	3,477	9,013	274	628	4,439	3,533	9,119
TAIWAN		286	102	2,151	1,092	3,154	222	81	1,524	833	2,236
CANADA		32	54	994	512	1,755	18	44	883	462	1,577
OTHER		598	238	2,548	3,405	3,614	570	200	2,402	3,140	3,412
Subtotal:------		1,194	982	10,131	8,486	17,536	1,084	953	9,249	7,968	16,344
CND PEARS(JUN)	MT										
JAPAN		6	0	79	74	221	7	0	97	90	276
CANADA		0	4	66	112	96	0	3	50	74	73
PANAMA		0	0	1	83	84	0	0	2	61	70
SAUDI ARABIA		0	0	43	40	71	0	0	41	38	69
EC 12		0	0	51	46	63	0	0	51	39	66
SINGAPORE		0	7	31	28	62	0	8	40	32	87
OTHER		29	74	262	410	434	28	57	264	355	447
Subtotal:------		34	85	535	792	1,031	34	6[illegible]	545	689	1,087

U.S. EXPORTS OF SELECTED COMMODITIES BY DESTINATION
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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND PNEAPL(JAN)	MT										
CANADA		829	236	6,331	5,174	6,331	587	136	4,686	3,458	4,686
EC 12		685	125	4,161	2,066	4,161	530	131	3,612	1,908	3,612
NETHERLANDS		130	4	1,097	322	1,097	131	3	1,040	278	1,040
GERMANY, FEDERAL		76	30	943	1,331	943	80	30	983	1,249	983
BELGIUM-LUXEMBOU		0	0	775	60	775	0	0	518	68	518
UNITED KINGDOM		390	91	754	257	754	255	97	508	205	508
OTHER		147	281	2,002	1,786	2,002	147	235	2,074	1,745	2,074
Subtotal:------		1,661	642	12,495	9,026	12,495	1,264	502	10,373	7,111	10,373
FRT MIXTURES(JUN)	MT										
JAPAN		674	453	3,828	1,628	7,201	757	234	4,169	1,622	8,047
CANADA		545	130	3,213	1,352	4,758	518	111	3,153	1,258	4,659
PHILIPPINES		264	426	1,161	1,548	1,597	266	467	1,003	1,651	1,435
HONG KONG		40	19	1,035	403	1,433	45	19	1,105	437	1,515
SINGAPORE		556	59	1,177	1,031	1,403	548	61	1,183	1,057	1,411
OTHER		672	481	3,986	3,799	6,582	691	528	4,457	3,937	7,024
Subtotal:------		2,750	1,568	14,400	9,760	22,973	2,825	1,421	15,069	9,962	24,[illegible]91
DRIED FRUIT											
DRD RAISI[illegible](AUG)	MT										
EC 12		4,429	3,233	20,211	19,675	42,313	6,174	5,131	29,893	29,513	61,578
JAPAN		3,200	1,859	10,388	8,113	22,565	4,409	3,476	14,823	14,161	34,636
UNITED KINGDOM		1,958	1,420	9,538	9,857	21,005	2,645	2,214	13,515	14,369	29,488
GERMANY, FEDERAL		970	622	4,076	3,827	8,628	1,374	1,114	6,051	5,917	12,737
DENMARK		629	367	3,254	2,602	5,780	852	510	5,054	4,025	8,693
SWEDE[illegible]		235	243	3,330	3,418	5,401	382	440	5,583	5,930	8,932
OTHER		1,681	2,177	13,235	12,639	26,018	3,390	3,857	25,236	23,056	47,738
Subtotal:------		9,5[illegible]5	7,513	47,162	43,[illegible]44	9[illegible],296	14,356	12,[illegible]05	75,534	72,661	152,883
DRD PRUN[illegible]S(AUG)	MT										
EC 12		2,496	3,808	14,971	19,480	28,807	4,346	6,499	23,929	31,740	47,264
JAPAN		683	983	3,668	4,748	9,898	972	1,414	4,988	6,912	14,023
ITALY		804	1,073	4,675	6,848	8,728	1,550	1,918	6,738	11,152	13,832
GERMANY, FEDERAL		424	777	3,081	3,258	8,118	720	1,331	5,667	5,667	14,563
CANADA		233	260	1,723	1,427	3,883	408	435	2,887	2,380	6,212
OTHER		1,558	1,002	7,726	8,033	14,743	2,487	1,587	13,018	13,019	24,461
Subtotal:------		4,969	6,053	28,088	33,687	57,331	[illegible],213	9,935	44,822	54,051	91,960
FRUIT JUICES(SSE)											
ORANGE JU CNC (DEC)	KL										
CANADA		4,879	7,718	4,879	7,718	65,815	2,992	4,196	2,992	4,196	34,827
EC 12		2,947	2,132	2,947	2,132	42,426	822	1,433	822	1,433	20,504
KOREA, [illegible]EPUBLIC		36	4,103	36	4,103	39,668	26	1,804	26	1,804	17,629
JAPAN		123	450	123	450	23,034	61	266	61	266	12,832
OTHER		6,655	4,926	6,655	4,926	65,696	3,112	2,425	3,112	2,425	31,342
Subtotal:------		14,641	1[illegible],329	14,641	19,32[illegible]	236,638	7,013	10,12[illegible]	7,013	10,124	117,134
ORNG JU NTCNC(DEC)	KL										
JAPAN		487	168	487	168	19,012	196	52	196	52	5,658
EC 12		920	798	920	798	10,657	708	430	708	430	8,260
FRANCE		896	798	896	798	9,985	700	430	700	430	8,026
CANADA		27	38	27	38	2,250	24	30	24	30	793
OTHER		856	430	856	430	9,807	315	158	315	158	3,447
Subtotal:------		2,290	1,435	2,290	1,435	41,726	1,243	671	1,243	671	18,158
GRPFRT JU CNC (DEC)	KL										
JAPAN		2,426	1,207	2,426	1,207	24,116	1,530	867	1,530	867	16,262
CANADA		731	842	731	842	9,815	405	532	405	532	5,073
EC 12		1,549	201	1,549	201	5,897	572	109	572	109	3,332
NETHERLANDS		274	32	274	32	2,543	199	19	199	19	1,786
OTHER		592	242	592	242	6,590	197	140	197	140	3,700
Subtotal:------		5,297	2,492	5,297	2,492	46,417	2,705	1,648	2,705	1,64[illegible]	28,366
FRESH VEGETABLES											
FR ASPARAGUS(OCT)	MT										
JAPAN		0	0	12	21	6,082	0	0	55	87	19,708
CANADA		15	30	36	165	4,900	38	65	96	364	10,415
EC 12		0	3	0	4	1,452	0	7	0	9	3,302
SWITZERLAND		0	0	0	0	1,241	0	0	0	0	2,571
OTHER		0	0	0	0	383	0	0	0	0	980
Subtotal:------		15	33	49	191	14,059	38	72	151	[illegible]61	36,976
FR O[illegible]IONS(OCT)	MT										
CANADA		5,956	2,559	14,815	7,594	42,808	1,594	681	3,945	2,020	11,439
JAPAN		3,109	4,786	18,066	18,602	31,860	892	1,139	4,899	4,129	8,278
TAIWAN		209	76	3,360	3,195	4,631	67	16	975	815	1,356
OTHER		1,622	1,441	6,498	6,769	12,548	612	381	2,078	1,819	4,087
Subtotal:------		10,897	8,864	42,739	36,158	91,[illegible]4[illegible]	3,165	2,218	11,897	8,7[illegible]2	25,160
CANNED VEGETABLES											
CND SWT CORN(AUG)	MT										
JAPAN		4,793	3,634	19,617	14,576	41,035	4,005	3,492	17,344	14,187	36,141
EC 12		4,217	1,642	15,813	19,387	25,371	3,057	1,229	11,951	15,003	18,857
GERMANY, FEDERAL		2,196	577	8,340	8,625	10,855	1,558	453	6,329	6,998	8,223
TAIWAN		1,211	2,103	4,158	5,996	9,267	1,031	1,862	3,238	4,929	7,334
UNITED KINGDOM		1,438	261	4,651	4,530	8,889	1,014	193	3,365	3,147	6,311
OTHER		2,891	1,760	9,662	13,113	19,404	2,248	1,253	7,270	9,587	14,393
Subtotal:------		13,112	9,139	49,250	53,073	95,077	10,341	7,836	39,804	43,706	76,726
CND TOM PAS(JUL)	MT										
CANADA		246	561	4,760	4,895	6,789	235	486	4,014	4,492	5,701
JAPAN		21	659	1,083	2,703	1,225	20	957	1,010	3,226	1,123
KOREA, REPUBLIC		56	0	419	859	541	57	0	419	1,117	530
OTHER		52	123	753	2,261	1,488	60	152	902	2,188	1,752
Subtotal:------		375	1,343	7,015	10,718	10,042	372	1,595	6,346	11,022	9,107

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MARKETING YEAR BEGINNING AS INDICATED
DEC 89

COMMODITY AND COUNTRY / COUNTRY REGION		QUANTITY					VALUE (000 DOLLARS)				
		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
CND TOM SAUCE(JUL)	MT										
EC 12		694	778	3,355	7,453	8,094	745	833	3,659	5,446	8,164
UNITED KINGDOM		694	412	3,355	1,545	6,920	745	431	3,659	1,478	7,257
CANADA		168	585	785	2,909	3,273	112	343	491	1,715	1,966
JAPAN		63	299	940	1,090	2,043	45	222	829	978	1,686
MEXICO		69	301	199	1,276	1,907	47	195	140	909	1,256
NETHERLANDS		0	32	0	271	1,027	0	62	0	224	802
OTHER		100	239	575	2,042	2,424	109	310	545	2,246	2,106
Subtotal:------		1,093	2,202	5,855	14,778	17,740	1,057	1,903	5,664	11,297	15,17[illegible]
FRZN VEGETABLES											
FZN SWT CORN(JUL)	MT										
JAPAN		2,953	2,762	16,967	15,978	33,762	2,426	2,364	14,135	14,049	27,616
EC 12		648	404	3,555	3,266	6,742	426	294	2,056	2,170	4,156
AUSTRALIA		810	444	2,694	3,416	5,152	491	313	1,623	2,218	3,085
UNITED KINGDOM		468	256	3,006	1,668	5,073	322	198	1,728	1,216	3,195
OTHER		551	1,071	2,022	4,650	7,255	433	849	1,451	3,363	4,272
Subtotal:------		4,961	4,6[illegible]0	25,239	27,310	52,910	3,776	3,[illegible]20	19,264	21,[illegible]00	39,129
FZN F FRY(JUL)	MT										
JAPAN		7,641	8,416	53,266	50,258	105,442	5,010	5,844	37,418	35,478	73,922
HONG KONG		384	1,267	2,903	6,510	9,820	248	474	1,833	2,454	4,117
OTHER		1,660	2,898	9,125	15,794	22,516	1,192	1,724	6,909	9,380	14,672
Subtotal:------		9,6[illegible]4	12,5[illegible]1	65,295	72,562	137,778	6,450	[illegible],042	[illegible]6,159	[illegible]7,313	92,711
TREE NUTS											
ALMONDS UNS[illegible](JUL)	MT										
INDIA		1,481	166	4,501	1,783	5,816	3,137	465	9,239	4,395	11,657
EC 12		51	0	2,551	510	3,194	118	0	4,179	751	6,155
JAPAN		143	156	623	1,697	2,322	398	493	1,707	5,103	6,614
NETHERLANDS		0	0	1,175	0	1,212	0	0	1,887	0	2,022
GERMANY, FEDERAL		31	0	489	180	879	95	0	1,081	251	2,398
OTHER		584	258	2,050	1,574	2,917	1,275	802	4,486	4,152	6,765
Subtotal:------		2,259	5[illegible]0	9,725	5,587	14,248	4,929	1,760	19,610	14,453	31,192
ALMND SH/PREP(JUL)	MT										
EC 12		7,910	6,161	65,824	42,613	99,161	24,326	19,178	200,024	138,553	304,850
GERMANY, FEDERAL		3,530	2,912	33,777	21,292	49,611	10,633	8,643	101,410	69,279	151,289
JAPAN		1,945	2,253	12,497	13,732	22,266	6,243	7,177	41,433	43,069	71,075
UNITED KINGDOM		1,172	849	7,924	6,278	13,082	3,444	2,861	24,771	21,392	41,336
UNION OF SOVIET		0	0	7,999	2,200	12,999	0	0	22,903	1,760	40,650
FRANCE		1,235	967	7,946	5,840	12,040	4,018	3,027	24,632	17,963	37,527
OTHER		2,829	2,590	20,767	24,512	37,025	9,650	8,515	67,542	79,077	116,039
Subtotal:------		12,684	11,149	107,0[illegible]7	[illegible]3,749	171,452	40,219	35,429	331,902	265,125	532,615
WALNUTS SH(AUG)	MT										
EC 12		177	188	2,228	3,035	3,869	634	592	5,372	7,427	9,589
JAPAN		145	541	734	1,775	2,976	485	859	2,411	3,008	6,261
CANADA		133	78	707	840	1,269	211	125	1,178	1,120	2,311
GERMANY, FEDERAL		67	49	747	819	1,229	198	221	1,251	1,820	1,973
SPAIN		82	90	371	1,257	1,167	325	178	1,347	3,099	3,698
AUSTRALIA		64	90	453	590	1,009	263	338	1,637	1,804	3,508
OTHER		394	360	1,465	2,120	3,040	1,014	917	4,367	5,723	8,475
Subtotal:------		912	1,257	5,587	8,361	12,162	2,606	2,831	14,966	19,082	30,144
WALNUTS UNSH(AUG)	MT										
EC 12		2,155	1,0[illegible]7	38,792	45,466	39,545	3,248	1,723	60,546	74,720	61,709
GERMANY, FEDERAL		162	0	13,618	16,305	13,692	240	0	21,294	26,325	21,390
SPAIN		522	637	12,670	14,356	12,868	774	1,012	19,635	24,238	19,987
ITALY		597	245	6,077	6,813	6,155	896	393	9,434	11,595	9,519
NETHERLANDS		82	39	2,507	2,743	2,624	215	64	4,184	4,405	4,380
OTHER		919	474	5,426	4,531	6,663	1,587	803	9,773	8,375	12,049
Subtotal:------		3,074	1,562	44,218	49,997	46,208	4,[illegible]35	2,526	70,319	[illegible]3,095	73,758
HOPS&PRODUCTS											
HOP PELTS(SEP)	MT										
BRAZIL		21	145	336	1,606	5,240	104	481	1,174	4,388	11,168
CANADA		278	5	1,305	680	2,912	930	26	3,853	4,340	10,579
EC 12		0	127	60	130	1,067	0	471	273	480	2,562
GERMANY, FEDERAL		0	113	0	113	987	0	422	0	422	2,188
OTHER		[illegible]3	2	321	1,938	1,446	503	15	1,647	10,560	7,189
Subtotal:------		381	279	2,021	4,355	10,666	1,537	993	6,947	19,76[illegible]	31,499
HOP EXTRACT(SEP)	MT										
EC 12		84	69	212	130	810	1,096	784	2,648	1,481	7,810
MEXICO		44	30	426	485	705	551	729	8,238	5,573	13,822
CANADA		152	32	179	93	525	822	258	1,066	822	3,880
BRAZIL		15	0	79	32	460	124	0	577	317	3,250
COLOMBIA		0	251	201	251	313	0	2,[illegible]19	1,354	2,819	3,602
NETHERLANDS		35	10	54	32	292	251	48	402	241	2,464
OTHER		65	11	177	296	847	723	95	2,197	3,290	10,580
Subtotal:------		360	391	1,275	1,285	3,662	3,317	4,684	16,081	14,302	42,945
HOPS,NSPF(SEP)	MT										
EC 12		82	6	413	251	658	301	43	1,805	1,484	2,772
GERMANY, FEDERAL		64	0	233	33	471	246	0	1,217	166	2,136
CANADA		52	0	189	83	264	166	0	639	454	937
UNITED KINGDOM		0	6	162	86	162	0	43	532	371	532
COLOMBIA		0	0	154	0	154	0	0	856	0	856
BRAZIL		10	27	44	56	111	63	121	168	218	370
OTHER		25	0	43	5	87	157	0	303	24	460
Subtotal:------		168	33	[illegible]43	395	1,273	6[illegible]8	164	3,770	2,1[illegible]0	5,394
WINE											
GRP WINE(JAN)	KL										
EC 12		1,097	1,099	18,285	20,547	18,285	1,657	1,456	27,064	28,799	27,064
CANADA		836	882	15,080	19,590	15,080	887	757	13,078	17,805	13,078
JAPAN		964	1,379	12,503	15,252	12,503	1,039	2,215	20,480	22,324	20,480
UNITED KINGDO[illegible]		652	722	11,872	11,860	11,872	1,001	923	17,044	17,145	17,044
SWEDEN		320	48	3,013	3,054	3,013	334	100	3,001	3,702	3,001
OTHER		836	1,239	10,503	14,220	10,503	1,222	1,798	16,032	20,036	16,032
Subtotal:------		4,053	4,647	59,384	72,663	59,384	5,138	6,326	79,655	92,666	79,655

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR FRT & MLNS											
FR APPLES(JUL)	MT										
CANADA		4,3[illegible]1	3,073	26,626	22,777	51,429	1,922	1,293	9,277	6,377	17,489
NEW ZEALAND		0	0	3,294	5,277	21,383	0	0	2,114	1,987	16,847
CHILE		0	0	628	399	27,219	0	0	205	139	8,503
OTHER		6	324	5,554	7,137	16,105	3	276	2,609	3,245	6,253
Subtotal:------		4,397	3,397	36,102	35,589	116,135	1,925	1,569	14,206	11,748	[illegible]9,091
FR BANANA(JAN)	MT										
HONDURAS		40,711	44,080	607,685	551,704	607,685	12,240	13,558	181,712	172,145	181,712
ECUADOR		65,021	73,822	757,341	849,642	757,341	15,144	16,081	172,743	204,717	172,743
COSTA RICA		47,730	52,215	595,130	637,105	595,130	13,921	16,572	166,867	192,045	166,867
COLOMBIA		44,509	29,463	446,852	426,222	446,852	12,418	8,588	122,192	117,099	122,192
OTHER		25,082	35,431	466,904	455,392	466,904	6,996	10,025	133,895	128,507	133,895
Subtotal:------		223,054	235,011	2,873,912	2,920,066	2,873,912	60,719	64,825	777,409	814,513	777,409
FR STRAWBRIS(JAN)	MT										
MEXICO		912	596	15,933	13,916	15,933	1,392	631	14,694	13,562	14,694
OTHER		770	381	1,943	2,460	1,943	1,486	749	3,669	4,341	3,669
Subtotal:------		1,682	977	17,876	16,375	17,876	2,878	1,380	18,363	17,903	18,363
FR ORANGES(NOV)	MT										
EC 12		[illegible]53	0	546	0	1,675	[illegible]10	2	514	5	1,899
DOMINICAN REPUBL		78	1[illegible]7	298	276	3,714	17	47	62	77	1,247
ITALY		0	0	0	0	594	0	0	0	0	1,011
SPAIN		453	0	546	0	1,081	410	0	514	0	878
OTHER		178	329	501	433	2,411	39	101	97	143	924
Subtotal:------		709	476	1,346	709	7,800	466	149	673	225	[illegible],070
FR GRAPE(JUN)	MT										
CHILE		7,[illegible]75	10,236	7,901	11,074	247,233	7,617	9,678	7,633	10,461	1[illegible]4,316
MEXICO		0	0	20,090	13,435	32,411	0	0	26,973	16,911	[illegible]1,608
OTHER		3	85	15,898	4,210	16,250	5	214	2,906	1,394	3,147
Subtotal:------		7,[illegible]78	10,321	43,889	28,719	295,894	7,6[illegible]2	9,892	37,512	28,767	229,071
FR MANGO(JAN)	MT										
MEXICO		0	0	27,169	43,923	27,169	0	0	24,746	37,042	24,746
OTHER		64	141	7,478	8,350	7,478	38	98	4,131	5,178	4,131
Subtotal:------		64	141	34,646	52,273	34,646	38	98	28,877	42,220	28,877
FR CANTLPE(MAY)	MT										
MEXICO		5,050	6,269	33,067	47,636	128,537	1,714	2,225	9,725	17,643	44,690
OTHER		9,804	6,515	14,946	19,326	68,496	2,250	1,276	3,522	4,328	18,203
Subtotal:------		14,854	12,784	48,014	66,962	197,033	3,964	3,501	13,247	21,971	62,893
FR MELON,OT(MAY)	MT										
MEXICO		3,381	8,501	17,382	27,697	53,999	1,424	2,3[illegible]1	5,521	9,716	14,764
COSTA RICA		0	0	69	391	9,081	0	0	43	165	4,446
OTHER		2,[illegible]85	3,434	7,234	8,733	34,259	675	942	2,184	2,441	9,841
Subtotal:------		5,[illegible]66	11,964	24,686	36,900	97,338	2,099	3,275	7,748	12,353	29,051
FR PEARS(JUL)	MT										
JAPAN		25	0	3,179	2,460	3,179	54	0	7,569	5,819	7,569
CHILE		0	0	0	0	20,552	0	0	0	0	6,765
ARGENTINA		0	0	430	0	12,332	0	0	217	0	4,993
OTHER		193	232	1,071	1,188	4,023	377	354	2,008	1,801	5,624
Subtotal:------		218	232	4,680	3,648	40,085	430	354	9,793	7,620	24,950
FR PINAPLE(JAN)	MT										
COSTA RICA		2,805	3,640	42,617	53,924	42,617	1,498	2,134	21,372	29,602	21,372
HONDURAS		1,900	1,046	24,402	13,641	24,402	581	314	6,589	4,297	6,589
OTHER		1,066	3,207	14,719	30,882	14,719	203	642	2,355	7,402	2,355
Subtotal:------		5,772	7,893	81,738	98,448	81,738	2,282	3,089	30,316	41,300	30,316
FR RASPBRY(JAN)	MT										
CANADA		0	0	10,845	7,978	10,845	0	0	15,166	12,026	15,166
CHILE		171	226	786	1,161	786	652	605	2,951	3,407	2,951
OTHER		7	1	57	34	57	47	2	271	94	271
Subtotal:------		178	227	11,687	9,174	11,687	699	607	18,388	15,527	1[illegible],388
CANNED FRUIT											
CND MANDRN(JAN)	MT										
EC 12		1,926	0	25,495	0	25,495	1,678	0	22,566	0	22,566
SPAIN		1,926	0	25,441	0	25,441	1,677	0	22,517	0	22,517
KOREA, REPUBLIC		188	0	9,965	0	9,965	208	0	11,440	0	11,440
OTHER		1,002	0	11,726	0	11,726	775	0	11,289	0	11,289
Subtotal:------		3,117	0	47,187	0	47,187	2,661	0	45,296	0	45,296
CND BLK OLV(NOV)	MT										
EC 12		149	31	303	109	720	195	74	442	191	1,241
GREECE		97	9	233	34	398	126	18	350	53	617
SPAIN		50	11	58	50	238	63	17	74	81	388
OTHER		0	3	0	6	40	0	10	0	23	99
Subtotal:------		149	34	303	115	760	195	85	442	213	1,340
CND GRN OLV(NOV)	MT										
EC 12		949	0	1,770	0	1,770	1,363	0	2,496	0	2,496
SPAIN		872	0	1,636	0	1,636	1,244	0	2,250	0	2,250
OTHER		321	0	370	0	370	100	0	135	0	135
Subtotal:------		1,270	0	2,140	0	2,140	1,463	0	2,632	0	2,632
CND PEACH(JUN)	MT										
EC 12		8,070	4,542	20,138	16,408	32,466	5,699	3,081	13,497	10,551	21,091
GREECE		6,649	2,571	15,572	13,178	26,610	4,665	1,610	10,238	8,129	16,992
CHILE		340	215	4,993	7,082	9,413	199	142	3,510	5,035	6,540
OTHER		41	4	1,697	2,905	3,180	38	7	863	1,576	1,562
Subtotal:------		8,451	4,760	26,829	26,395	45,060	5,937	3,230	17,870	17,162	29,193
CND PINAPLE(JAN)	MT										
THAILAND		11,091	0	128,976	77,635	128,976	6,318	0	75,492	44,256	75,492
PHILIPPINES		9,569	0	93,472	54,953	93,472	6,281	0	60,025	33,089	60,025
OTHER		2,294	0	25,998	22,089	25,998	1,319	0	17,284	13,467	17,284
Subtotal:------		22,954	0	248,446	154,676	248,446	13,918	0	152,800	90,812	152,800
DRIED FRUIT											
DRD APRCT(JUL)	MT										
TURKEY		798	615	3,141	3,527	5,178	1,727	1,143	6,567	6,600	10,988
NEW ZEALAND		157	0	953	497	1,317	354	0	2,025	1,036	2,904
OTHER		25	47	333	279	592	100	143	1,021	1,192	1,766
Subtotal:------		980	662	4,427	4,302	7,086	2,180	1,286	9,613	8,828	15,658
DATES(SEP)	MT										
PAKISTAN		545	504	1,002	1,846	6,308	619	623	1,118	1,313	5,412
CHINA (MAINLAND)		191	25	505	399	2,159	135	45	476	427	2,226
OTHER		362	1,315	523	1,792	1,355	516	1,539	742	1,894	1,641
Subtotal:------		1,098	1,845	2,030	4,038	9,822	1,271	2,207	2,336	3,634	9,279

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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
DRD FIG(SEP)	MT										
EC 12		86	67	2,237	2,260	2,257	150	104	3,674	3,826	3,691
GREECE		85	65	2,114	2,177	2,114	147	97	3,444	3,640	3,444
OTHER		41	16	732	445	785	54	37	1,095	694	1,160
Subtotal:------		127	83	2,969	2,705	3,042	205	141	4,768	4,520	4,852
DRD RAISIN(AUG)	MT										
MEXICO		575	489	3,603	3,936	4,913	522	502	3,235	3,561	4,545
CHILE		448	154	1,641	1,584	3,315	376	138	1,476	1,322	2,909
OTHER		133	456	840	1,186	1,645	133	503	887	1,355	1,734
Subtotal:------		1,156	1,099	6,084	6,706	9,872	1,031	1,143	5,598	6,238	9,188
FRUIT JUICE(SSE)											
APPLE JUIC(JUL)	KL										
EC 12		43,593	21,845	188,966	93,071	416,949	8,949	4,344	43,436	20,140	93,927
GERMANY, FEDERAL		26,918	15,151	111,851	61,690	252,886	5,383	2,932	24,206	12,937	55,361
ARGENTINA		26,768	4,497	147,246	129,579	231,170	4,939	711	28,399	23,374	44,007
OTHER		39,205	23,010	140,789	123,428	314,196	7,021	4,853	29,936	25,493	65,761
Subtotal:------		109,566	49,352	477,001	346,078	962,315	20,909	9,909	101,772	69,007	203,695
FCOJ(DEC)	KL										
BRAZIL		151,434	138,120	151,434	138,120	875,955	57,423	32,673	57,423	32,673	267,709
OTHER		6,362	6,659	6,362	6,659	175,229	2,458	1,410	2,458	1,410	59,240
Subtotal:------		157,796	144,779	157,796	144,779	1,051,185	59,881	34,083	59,881	34,083	326,949
GRAPE JU(JAN)	KL										
ARGENTINA		2,982	5,235	28,448	48,624	28,448	648	1,003	5,661	9,767	5,661
BRAZIL		762	603	10,224	13,228	10,224	206	226	2,631	4,343	2,631
OTHER		130	591	4,405	4,878	4,405	122	363	2,240	2,285	2,240
Subtotal:------		3,875	6,429	43,077	66,730	43,077	975	1,593	10,532	16,394	10,532
PNEAPL JUCN(JAN)	KL										
PHILIPPINES		6,713	8,962	91,123	112,043	91,123	1,003	1,507	16,090	20,019	16,090
THAILAND		5,857	13,386	83,248	109,823	83,248	936	2,253	13,765	18,338	13,765
OTHER		676	3,691	23,155	18,607	23,155	123	709	4,470	3,432	4,470
Subtotal:------		13,246	26,039	197,525	240,473	197,525	2,062	4,469	34,325	41,789	34,325
PNEAPL JUNC(JAN)	KL										
PHILIPPINES		1,141	1,326	25,225	30,219	25,225	336	390	7,426	8,885	7,426
JAPAN		0	2,063	3,228	4,700	3,228	0	1,008	1,947	2,386	1,947
OTHER		110	392	1,288	4,716	1,288	58	198	523	1,744	523
Subtotal:------		1,252	3,781	29,741	39,635	29,741	394	1,596	9,896	13,016	9,896
FROZEN FRUIT											
FZN STRBRY(DEC)	MT										
MEXICO		482	10	482	10	17,018	244	7	244	7	10,469
OTHER		211	134	211	134	2,796	136	140	136	140	2,157
Subtotal:------		693	145	693	145	19,814	380	146	380	146	12,627
FRESH VEGETABLES											
FR BEANS(OCT)	MT										
MEXICO		1,101	2,103	1,208	2,413	11,537	1,123	2,250	1,235	2,545	11,421
OTHER		335	50	1,026	93	2,167	307	46	811	120	1,614
Subtotal:------		1,436	2,152	2,234	2,506	13,704	1,430	2,296	2,046	2,665	13,034
FR CARROT(OCT)	MT										
CANADA		3,029	7,125	19,350	23,674	35,241	631	1,041	4,316	4,079	7,705
MEXICO		748	308	1,652	650	16,946	97	38	194	86	3,581
OTHER		263	19	751	83	1,211	219	18	629	80	1,019
Subtotal:------		4,041	7,453	21,754	24,406	53,398	947	1,097	5,139	4,245	12,305
FR CABBAGE(OCT)	MT										
CANADA		627	2,651	4,308	7,792	16,571	114	719	841	1,624	3,564
OTHER		250	2,170	275	2,278	3,944	59	342	65	366	876
Subtotal:------		877	4,822	4,583	10,070	20,515	173	1,062	905	1,990	4,441
FR CELERY(OCT)	MT										
MEXICO		176	674	176	1,006	12,578	29	129	29	198	3,378
CANADA		0	0	1,082	643	5,211	0	0	320	155	1,481
OTHER		61	86	225	176	1,306	19	12	55	26	256
Subtotal:------		236	760	1,482	1,825	19,095	48	141	404	380	5,115
FR CUCMBR(OCT	MT										
MEXICO		25,448	37,314	45,727	58,620	181,253	7,129	13,840	13,533	24,096	74,086
OTHER		143	65	548	502	11,292	72	66	450	633	5,425
Subtotal:------		25,591	37,379	46,275	59,121	192,545	7,201	13,906	13,983	24,729	79,511
FR CAULFLWR(OCT)	MT										
MEXICO		663	1,692	691	2,488	5,065	142	382	147	630	1,115
CANADA		0	0	228	452	1,369	0	0	70	150	436
OTHER		48	12	121	12	188	36	8	85	8	122
Subtotal:------		711	1,704	1,041	2,952	6,621	178	390	302	788	1,673
FR GARLIC(OCT)	MT										
MEXICO		1	0	4	7	8,216	3	2	4	29	5,497
ARGENTINA		1	0	1	0	2,716	1	0	1	0	2,751
OTHER		0	720	161	3,177	2,839	0	742	217	2,660	3,577
Subtotal:------		2	721	165	3,184	13,771	4	744	223	2,689	11,825
FR ONION(OCT)	MT										
MEXICO		9,368	10,972	18,116	21,702	139,857	8,827	5,783	16,540	14,429	59,929
OTHER		1,145	1,249	3,731	4,245	17,860	505	510	1,432	1,742	6,366
Subtotal:------		10,512	12,222	21,847	25,947	157,717	9,332	6,294	17,972	16,171	66,295
FR PEPPERS(OCT)	MT										
MEXICO		8,092	13,952	13,414	20,243	123,744	6,176	9,714	10,402	15,693	81,779
EC 12		144	85	1,000	1,437	6,653	428	400	2,383	4,809	17,958
NETHERLANDS		141	84	963	1,412	6,509	422	395	2,309	4,728	17,631
OTHER		252	98	892	704	2,684	151	93	522	731	3,285
Subtotal:------		8,486	14,135	15,304	22,385	133,080	6,755	10,207	13,307	21,233	103,022
FR SEED POT(OCT)	MT										
CANADA		1,461	3,419	3,424	5,901	70,382	223	572	561	1,013	12,940
OTHER		0	6	14	14	139	0	7	4	15	34
Subtotal:------		1,461	3,425	3,439	5,915	70,521	223	579	565	1,028	12,974
FR TBL POT(OCT)	MT										
CANADA		12,045	20,928	45,453	61,654	213,997	2,585	4,217	9,040	12,138	48,808
OTHER		17	0	32	9	861	4	0	8	11	177
Subtotal:------		12,062	20,928	45,485	61,663	214,858	2,589	4,217	9,048	12,149	48,985
FR TOMATO(OCT)	MT										
MEXICO		6,244	20,340	42,513	70,163	358,265	2,919	13,456	16,787	34,395	204,708
OTHER		269	250	721	897	7,586	211	197	673	842	7,443
Subtotal:------		6,513	20,590	43,234	71,059	365,851	3,130	13,653	17,461	35,237	212,151

U.S. IMPORTS OF SELECTED HORTICULTURAL COMMODITIES BY ORIGIN
MARKETING YEAR BEGINNING AS INDICATED
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COMMODITY AND COUNTRY		QUANTITY					VALUE (000 DOLLARS)				
COUNTRY REGION		CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR	CURR MO LAST YR	CURR MO CURR YR	YR TDT LAST YR	YR TDT CURR YR	LAST YEAR
FR ASPARG(OCT)	MT										
MEXICO		121	219	309	608	12,059	214	401	449	1,018	13,709
OTHER		580	732	2,100	2,610	2,775	951	1,206	3,175	3,725	4,298
Subtotal:------		701	951	2,409	3,218	14,834	1,164	1,608	3,624	4,743	18,006
CANNED VEGETABLES											
CND TOM PST(JUL)	MT										
CHILE		109	12	731	772	19,266	48	9	394	609	17,702
MEXICO		0	185	3,357	2,503	19,764	0	136	2,009	1,925	15,211
BRAZIL		2,259	68	10,127	906	17,130	1,636	70	7,011	855	13,954
OTHER		3,148	2,388	7,199	18,489	46,184	2,749	2,184	5,849	16,205	45,226
Subtotal:------		5,515	2,653	21,414	22,670	102,344	4,432	2,399	15,263	19,594	92,093
CND TOM SAUCE(JUL)	MT										
EC 12		268	18	1,508	45	1,508	206	8	1,076	18	1,076
SPAIN		0	0	592	16	592	0	0	459	7	459
ITALY		226	18	621	28	621	161	8	379	11	379
ISRAEL		60	0	599	154	614	23	0	343	82	347
OTHER		76	18	109	271	976	37	13	55	157	451
Subtotal:------		404	36	2,216	470	3,098	267	21	1,474	257	1,874
CND TOMATO(JUL)	MT										
EC 12		11,771	1,834	40,039	9,548	45,471	7,271	841	24,162	4,283	27,374
ITALY		8,443	1,504	27,989	6,728	30,329	5,432	662	17,508	2,952	18,922
SPAIN		3,328	331	11,782	2,800	14,873	1,839	179	6,505	1,319	8,302
TAIWAN		5	0	1,226	105	11,017	3	0	578	70	6,786
OTHER		908	2,761	2,960	13,754	14,910	472	1,473	1,679	7,842	8,214
Subtotal:------		12,685	4,595	44,225	23,408	71,397	7,746	2,314	26,418	12,196	42,374
CND MSHROOM(JUL)	MT										
CHINA (MAINLAND)		583	11	8,845	6,053	29,261	1,326	34	20,345	13,362	65,923
TAIWAN		200	508	2,624	3,660	8,487	413	1,389	6,661	10,199	23,916
OTHER		896	2,754	5,838	12,696	14,164	2,226	6,906	14,866	30,622	35,364
Subtotal:------		1,679	3,275	17,306	22,410	51,913	3,965	8,329	41,872	54,184	125,204
FROZEN VEGETABLES											
FZN BROCLI(SEP)	MT										
MEXICO		5,147	0	17,910	0	17,910	3,341	0	10,710	0	10,710
GUATEMALA		1,177	0	4,097	0	4,097	835	0	3,068	0	3,068
OTHER		256	0	541	0	541	195	0	426	0	426
Subtotal:------		6,580	0	22,548	0	22,548	4,372	0	14,204	0	14,204
FZN CAULFLR(SEP)	MT										
MEXICO		3,037	0	10,227	0	10,227	2,146	0	6,637	0	6,637
OTHER		16	0	546	0	546	10	0	370	0	370
Subtotal:------		3,052	0	10,773	0	10,773	2,156	0	7,007	0	7,007
FZN POTATO(SEP)	MT										
CANADA		2,011	4,087	15,651	16,299	45,549	980	2,187	7,526	8,686	23,041
OTHER		20	111	80	438	630	14	57	42	227	356
Subtotal:------		2,032	4,198	15,731	16,737	46,179	994	2,244	7,569	8,914	23,398
TREE NUTS											
PISTACHIO NSH(SEP)	MT										
TURKEY		0	147	37	368	189	0	621	184	1,526	788
CHINA (MAINLAND)		26	0	91	0	187	75	0	237	0	498
HONG KONG		0	24	0	191	224	0	50	0	364	440
OTHER		4	5	6	15	60	8	24	14	75	244
Subtotal:------		30	175	134	574	660	82	695	436	1,965	1,970
CASHEW NUT(AUG)	MT										
INDIA		736	1,269	7,120	10,476	15,813	4,284	4,909	40,335	51,147	85,820
BRAZIL		1,780	1,521	8,298	9,074	20,308	8,385	5,902	38,526	35,539	85,119
OTHER		563	728	4,024	4,109	8,596	2,198	2,376	17,287	15,044	34,917
Subtotal:------		3,079	3,518	19,442	23,660	44,717	14,867	13,187	96,148	101,730	205,856
FILBERTS(AUG)	MT										
TURKEY		677	318	1,505	1,068	3,357	1,918	834	4,575	2,742	9,529
EC 12		26	89	127	717	817	98	212	459	1,312	2,145
OTHER		14	0	167	34	191	40	0	499	94	566
Subtotal:------		717	407	1,799	1,820	4,365	2,057	1,046	5,534	4,148	12,240
PECANS NSH(SEP)	MT										
MEXICO		77	2,136	1,548	3,892	1,591	76	3,627	2,032	6,114	2,059
OTHER		0	0	0	0	14	0	0	0	0	32
Subtotal:------		77	2,136	1,548	3,892	1,604	76	3,627	2,032	6,114	2,091
WINES											
CHMP&SPRK WN(JAN)	KL										
EC 12		4,834	4,617	48,540	45,164	48,540	25,400	24,062	294,098	284,156	294,098
FRANCE		1,312	1,648	14,753	15,493	14,753	14,661	15,089	184,483	183,547	184,483
ITALY		1,764	1,103	18,298	16,534	18,298	5,399	4,006	63,840	60,653	63,840
OTHER		43	23	758	305	758	146	74	2,119	1,028	2,119
Subtotal:------		4,876	4,[illegible]40	49,299	45,468	49,299	25,546	24,136	296,217	285,184	296,217
FT&VERM WN(JAN)	KL										
EC 12		1,065	1,488	16,308	15,518	16,308	3,812	5,116	54,655	49,750	54,655
SPAIN		201	545	5,098	4,446	5,098	808	1,974	20,594	17,869	20,594
ITALY		626	680	8,592	8,646	8,592	1,370	1,381	17,476	18,000	17,476
PORTUGAL		140	129	1,402	1,183	1,402	1,261	1,129	12,654	9,779	12,654
OTHER		20	3	151	117	151	72	7	607	535	607
Subtotal:------		1,085	1,491	16,459	15,635	16,459	3,[illegible]84	5,123	55,262	50,284	55,262
OTH GP WINE(JAN)	KL										
EC 12		15,773	15,517	207,179	194,548	207,179	40,442	42,294	542,812	540,807	542,812
FRANCE		5,410	5,689	67,526	67,984	67,526	22,093	21,345	280,000	285,029	280,000
ITALY		7,650	7,193	98,850	91,508	98,850	12,106	14,814	174,358	174,472	174,358
OTHER		1,633	1,976	18,847	23,194	18,847	3,448	3,940	35,706	43,186	35,706
Subtotal:------		17,405	17,494	226,026	217,742	226,026	43,890	46,234	578,517	583,993	578,517
OTH WN PROD(JAN)	KL										
EC 12		718	121	10,500	3,084	10,500	902	143	13,309	3,709	13,309
JAPAN		292	185	3,901	2,734	3,901	673	530	9,587	7,071	9,587
ITALY		372	0	6,585	1,160	6,585	455	0	8,574	1,326	8,574
OTHER		103	32	1,329	639	1,329	163	64	1,998	1,185	1,998
Subtotal:------		1,113	339	15,730	6,455	15,730	1,738	737	24,894	11,964	24,894
CUT FLOWERS											
ROSES(JAN)	NONE										
COLOMBIA		0	0	0	0	0	3,107	4,024	49,211	56,416	49,211
OTHER		0	0	0	0	0	806	1,059	13,545	18,896	13,545
Subtotal:------		0	0	0	0	0	3,912	5,083	62,755	75,312	62,755
CARNATIONS(JAN)	NONE										
COLOMBIA		0	0	0	0	0	6,462	5,723	60,287	68,675	60,287
OTHER		0	0	0	0	0	574	311	4,660	4,229	4,660
Subtotal:------		0	0	0	0	0	7,036	6,034	64,948	72,904	64,948

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